

Presiding Bishopric Departments Policies

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Preface

This is the official repository for temporal affairs policies, processes, and tools of the Church under the direction of the Presiding Bishopric.

Introduction

As directed by the First Presidency, the Presiding Bishopric supports the worldwide mission of the Church by overseeing Church temporal affairs, which include finances; materials and products; physical facilities; member, leader, and unit information; welfare; technology and communications; security and safety; human resources (in conjunction with the Human Resource Committee); and other matters as assigned by the First Presidency. The doctrines, principles, and policies relating to temporal affairs are set forth in the scriptures, the Church handbooks, and Policy Point.

Administration of Temporal Affairs

The Lord has assigned the Presiding Bishopric to administer “all temporal things” (D&C 107:68). The Presiding Bishopric appoints managing directors of departments at Church headquarters that assist them in providing temporal affairs services. In area offices, the Presiding Bishopric appoints directors for temporal affairs and associated temporal affairs support staff.

The director for temporal affairs is the Presiding Bishopric’s representative in the area. He reports to both the Area Presidency and the Presiding Bishopric. Within approved policies, processes, and budgets, he helps the Area Presidency direct area operations.

The First Presidency, the Quorum of the Twelve Apostles, and the Presiding Bishopric approve temporal affairs policies, processes, and systems and standardize temporal affairs services Church-wide. Sufficient flexibility is provided to accommodate local needs. Managing directors at Church headquarters oversee global processes on behalf of the Presiding Bishopric. They also provide technical training and review temporal affairs in the areas, as assigned by the Presiding Bishopric or as requested by the Area Presidency or the director for temporal affairs.

Human Resources

Our Standards of Conduct

And Other Human Resource Policies

Employees, Church-service Missionaries and Other
Volunteers

of Legal Entities Affiliated with

The Church of Jesus Christ of Latter-day Saints

****Section 1, Our Standards of Conduct, applies globally. However, sections 2 through 9 are United States specific. For Area-specific policies, contact your HR representative.****

1. Our Standards of Conduct

Statement of Purpose

The Lord has promised His people that “inasmuch as [ye] are faithful, and exercise faith in me . . . ye shall obtain power to organize yourselves according to the laws of man” so that others “may not have power over you” and, significantly, that “you may be enabled to keep my laws.” (Doctrine & Covenants 44:2, 4-5) The Articles of Faith also provide: “We believe in . . . obeying, honoring, and sustaining the law.” (Articles of Faith 1:12)

It is essential that those who act on behalf of the Church – wherever they may be – obey, honor and sustain the laws that apply to them. As the Lord has assured us, “he that keepeth the laws of God hath no need to break the laws of the land.” (D&C 58:21) We should let integrity be our standard, obey the laws of the lands in which we operate and be ethical and honest in all our dealings. As we do so, we will receive the Lord’s protection and help in furthering His work.

Our Standards of Conduct has been developed as Section 1 of the Human Resource Policies so, by following the standards described, we might better be entitled to the Lord’s protection and help. We ask you to read and understand Our Standards of Conduct from beginning to end. These principles, while in some instances going beyond the requirements of the law, represent minimum standards of conduct for all who act

on behalf of Church-affiliated entities. These standards apply to all who have responsibility for the Church’s ecclesiastical or temporal activities, including General Authorities, Area Seventies, general Church officers, Church employees and Church-service missionaries and other volunteers in a workplace setting.

We recognize that no written set of standards can anticipate and give direction for every situation that may arise. Indeed, the Savior himself declared that “it is not meet that I should command in all things . . .” (D&C 58:26) We ask that in every situation you do the right thing – always.

As we do this together, the Lord will bless and magnify this work.

Sincerely,

The Human Resource Committee

1.1 Overview

This first section of the Human Resource Policies sets out and explains Our Standards of Conduct (“Our Standards”). In many cases, the policies in this first chapter are explained in greater detail in later chapters. You may think of Our Standards in this simple way:

Ask before acting:

- Is the action I plan to take legal?
- Is the action consistent with Church policy?
- In my conduct, am I being fair and honest?
- How would my action be viewed by those outside the Church?

Remember these rules:

- Learn the legal and Church standards and policies that apply to you.
- Ask if you are ever unsure what the right thing to do is.
- Follow Our Standards.
- Report if you have a concern or believe someone is

violating Our Standards.

In summary:

- There is no right way to do a wrong thing.
- It is wrong to do a right thing in a wrong way.
- Do what is right; let the consequence follow.

1.2 Introduction

Who Must Follow Our Standards of Conduct?

The Church of Jesus Christ of Latter-day Saints operates and conducts its affairs through legal entities, such as Corporation of the President of The Church of Jesus Christ of Latter-day Saints and Corporation of the Presiding Bishop of The Church of Jesus Christ of Latter-day Saints, that have been organized in accord with the laws of various countries where the Church is present. Throughout this document, we use the term “the Church” to mean the Church and its legal entities. We use the term “Church Workers” to mean General Authorities, Area Seventies, general Church officers, Church employees and Church-service missionaries and other volunteers in a workplace setting.

Our Standards apply to all Church Workers, unless specifically noted, wherever located.

What Are the Scope and Purposes of Our Standards?

Our Standards are minimum responsibilities Church Workers are expected to fulfill, both in letter and in spirit. These responsibilities include abiding by applicable legal requirements and demonstrating the highest principles of ethical conduct – regardless of whether those requirements or principles are spelled out in Our Standards. Church Workers should also comply with other Church policies, such as human resource, finance and computer usage policies. Ignorance of Our Standards does not excuse you from compliance.

No one has the authority to approve illegal or unethical acts by anyone acting on behalf of the Church. If you are faced with this situation, speak up.

Do Our Standards Apply in Different Countries?

Our Standards, including our commitment to obey the applicable law, apply in every country – regardless whether others obey that law. Church Workers may be

subject to different laws in different countries, as well as laws of the United States that may apply to Church operations globally. Each of us has an important responsibility to know and follow the relevant laws that apply where we work.

What Happens If I Violate Our Standards or the Law?

Church Workers who violate the applicable law or Our Standards may be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Any violation of law is a violation of Our Standards. Failure to report a violation of Our Standards, retaliation against someone else for reporting a violation or cooperating in an investigation, or lying or withholding relevant information in making a report or in an investigation also violate Our Standards. Church Workers who commit criminal acts may also be subject to criminal prosecution. All Church Workers are expected to cooperate fully in authorized internal and external investigations of potential violations of Our Standards.’

1.3 Asking Questions and Raising Concerns

The Church can only live up to its commitment to act with integrity if Church Workers speak up. You should speak up if:

- You are unsure about the proper course of action and need advice.
- You believe someone acting on behalf of the Church is doing, has done or may do something unlawful or that violates Our Standards.
- You believe you may have been involved in misconduct, even inadvertently.

Each of us should report violations of Our Standards (even if the violation is motivated by a misguided attempt to benefit the Church) by anyone (regardless of their position). Good intentions do not justify improper conduct. If you do not report a violation, you could be held accountable and subject to corrective action, even though you were not involved in the original violation.

Whom Should I Contact for Help or to Raise a Concern?

If you have a question about how to act ethically and appropriately in a particular situation, ask. Normally,

address your questions to your supervisor first. If your supervisor cannot answer your question, you may consult with your supervisor as to whom to contact for assistance. If you feel you cannot speak with your supervisor, you may also contact the human resource ("HR") manager for your department or area, the Director, HR Legal Services & Standards Officer at Church headquarters, the Managing Director or the Director for Temporal Affairs for your department or area, the Church Auditing Department or the Standards Line described below. When questions arise about the laws that apply to our activities, ask the Office of General Counsel ("OGC"), including the Area Legal Counsel for your area.

Members of management who receive reports of apparent misconduct should contact the Standards Officer or the Standards Line regarding how to proceed.

What Is the Standards Line?

At any time, even if you already have asked a question or raised a concern with the contacts suggested above, you may contact the Standards Line:

- If you are located in a European Union Member Country: <https://standardslineeu.alertline.com>
- If you are located in Spain or Portugal: <https://standardslinesp.alertline.com>
- If you are located anywhere else in the world: <https://standardsline.alertline.com>
- By telephone at the number of the country from which you call: <https://home.ldschurch.org/HRDdept/Pages/Standards-of-Conduct.aspx>

Where applicable laws allow, (most countries) your contact may be anonymous if you desire. The Standards Line is operated under OGC's direction. Reports will be investigated appropriately. Prompt action, as dictated by the facts, will be taken. If appropriate, you will be notified of the resolution of your report. For more information about the Standards Line, please refer to the Standards Line website above.

No Retaliation

Church Workers who in good faith lawfully and

truthfully seek advice or report, including by contacting the Standards Line, or participate in an investigation of any apparent violation of Our Standards, or who seek protection under applicable laws, must not be subjected to any form of retaliation. Any Church Worker who engages in retaliation will be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service.

1.4 Personal Conduct and Our Workplace

Qualified Applicants Considered for Employment

Only members of the Church who are worthy of a temple recommend qualify for employment. Apart from this, the Church is an equal opportunity employer and does not discriminate in its employment decisions on any basis that would violate U.S. or local law. Qualified applicants will be considered for employment and employees will be considered for advancement or other job-related benefits without regard to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or other legally protected categories that apply to the Church. The Church will make reasonable accommodations for qualified individuals with known disabilities, unless doing so would result in an undue hardship to the Church.

Temple Worthiness

As a Church Worker, you must either hold a current temple recommend or be certified by your bishop or branch president as worthy of holding a temple recommend. This standard has many benefits:

- Church Workers who live the Church's teachings are more likely to support its mission at work.
- Church Workers who share common values can maximize unity and teamwork and improve communication among themselves, members and leaders.
- Church Workers who sustain the leaders of the Church are more likely to support the work-related policies established by those leaders.
- Church Workers who live the Church's teachings better represent the values and reputation of the Church to individuals and organizations who deal

with the Church.

- Church Workers who believe the Church's teachings and have a testimony of God the Eternal Father and His Son, Jesus Christ, are more likely to pray sincerely for and receive assistance in their work responsibilities.

A Church Worker who ceases to be worthy of a temple recommend, for whatever reason, may be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service.

Church Workers must establish worthiness to hold a temple recommend at regularly scheduled intervals and on an as-needed basis. Bishops or branch presidents may be contacted for those Church Workers who do not hold or show on request a current temple recommend.

Highest Level of Integrity and Conduct

Church Workers represent the Church at all times – not just during business hours. Consequently, Church Workers must demonstrate the highest level of integrity and conduct at all times, whether at or away from work. Conduct at work or elsewhere that is detrimental to the reputation of the Church, whether or not it results in the loss of a temple recommend, may result in corrective action, including termination from employment or involuntary release from missionary or volunteer service.

Church Workers must avoid viewing pornography. Those who view, attempt to view or distribute pornography at work, on Church property, or anywhere using Church-provided technology (as defined in the Technology Use policy), will be terminated from employment or involuntarily released from missionary or volunteer service. Those who view, attempt to view or distribute pornography away from work may be subject to corrective action.

Any Church Worker who is under the influence of alcohol or drugs at work is subject to immediate termination from employment or involuntary release from missionary or volunteer service. Church Workers who use or distribute substances prohibited by the Word of Wisdom, even away from work, may also be subject to corrective action.

No Discrimination or Harassment

Each of us has a responsibility to maintain a workplace that fosters mutual respect. Discrimination and/or harassment in any form, and sexual harassment in particular, are prohibited. Specifically, the Church prohibits discrimination and/or harassment that is sexual or related to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or any other legally protected categories that apply to the Church. Church Workers should not harass, threaten, or degrade any person.

Harassment may include words, gestures, or actions that annoy, alarm, or abuse another person or create an intimidating, hostile, or offensive working environment. Harassment also includes derogatory or degrading remarks, slurs and inappropriate jokes and epithets.

Sexual harassment includes unwelcome sexual advances, requests for sexual favors and any other verbal, non-verbal or physical conduct of a sexual nature, when submission to that conduct is a term or condition of employment, affects employment decisions, unreasonably interferes with a person's work performance or creates a hostile or offensive work environment. Examples include but are not limited to:

- Verbal conduct such as talking about sex or sexual feelings, telling sexual jokes or stories, asking personal questions about dating or sexual life, making sexual comments or innuendoes, whistling or making other suggestive sounds, repeatedly asking for dates or other personal attentions.
- Nonverbal conduct such as displaying or emailing materials with sexually suggestive words or pictures, making sexual gestures, giving items of a sexual or personal nature, staring at a person's body or clothing, leering, looking a person up and down, blocking a person's path, hindering a person's movement, or standing closer than appropriate.
- Physical conduct such as kissing, hugging, or massaging another person or intentionally touching another's body, clothing, or hair.

If you feel you have been discriminated against or harassed, you should immediately report the incident to

your supervisor. If you believe your supervisor is involved in the alleged misconduct or you are otherwise uncomfortable reporting your concern to your supervisor, you may instead report the incident to any other manager in your department or area, the HR manager for your department or area, the Standards Line, or the Director, HR Legal Services & Standards Officer. You are encouraged to report immediately any incident of discrimination or harassment you witness. Although not required, you are encouraged to tell the person engaging in the discriminating and/or harassing conduct that it is unwelcome, offensive and should stop at once.

A supervisor who learns of an alleged incident of work-related discrimination or harassment involving a Church employee (including an incident when the alleged discriminator or harasser is not a Church employee) must immediately report it to the HR manager for the department or area, who in turn must report it to the Standards Line or the Director, HR Legal Services, even if the employee who is the alleged victim requests that it not be reported. A supervisor who fails to report in this way may be subject to corrective action.

The Church will investigate all reports appropriately, as confidentially as possible and will take prompt action, up to and including termination from employment or involuntary release from missionary or volunteer service, against any Church Worker found to engage in discrimination and/or harassment. Any Church Worker who knowingly makes a false claim will be subject to corrective action. If appropriate, you will be notified of the resolution of your report.

Applicants and Employees with Disabilities

The Church complies with applicable laws regarding applicants and employees with disabilities, such as the Americans with Disabilities Act ("ADA") in the U.S. In its application and interview process, the Church affords equal opportunity to and makes reasonable accommodation for all persons with a disability who meet the skill, experience, education and other requirements of the desired position. Qualified persons with a disability will have the opportunity to explain or demonstrate the ability to perform the essential functions of the desired position.

As needed, the Church will make reasonable

accommodations for qualified applicants or current employees with a disability who receive an offer so they may perform the essential functions of the job, provided this does not result in an undue hardship to the Church. The Church will also make reasonable accommodations to current employees who become disabled, as long as they can still perform the essential functions of the job.

Employees desiring an accommodation should ask the HR manager for their department or area, who will ask the employee to complete a request form and refer the request to the ADA Committee to determine if the employee qualifies under the ADA and, if so, whether a reasonable accommodation can be provided. This committee will consider and approve, modify, or disapprove accommodation requests. Supervisors should not grant or deny requests for accommodation but should instead refer such requests to the department HR manager.

No Workplace Violence

The Church will not tolerate violence in the workplace. Any Church Worker who engages in or threatens workplace violence is subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Workplace violence includes physically harming another, brandishing weapons, shoving, pushing, fighting, hitting, biting, kicking, threatening gestures, intentionally damaging anyone's property at work, or the Church's or a Church Worker's property anytime, stalking, excessively visiting, calling or emailing another Church Worker, any other intimidating, coercing or deliberate, unwelcome conduct, threatening or talking of engaging in any of these activities and any other threatening behavior.

No one except authorized law enforcement personnel may have a weapon on Church property or carry a weapon while performing services for the Church. Weapons include guns, knives, explosives and other items designed to inflict bodily harm.

Church Workers who feel threatened by another person in connection with their work, or who witness any workplace violence or violation of this policy, should immediately report the incident to their supervisor or the HR manager for their department or area, the Standards Officer, the Managing Director or

the Director for Temporal Affairs for your department or area, the Church Security Department, or the Standards Line described above.

The Church will investigate all reports of a violation of this policy as confidentially as possible. Church Workers who violate this policy are subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Any Church Worker who knowingly makes a false claim will be subject to corrective action. As appropriate, they will be notified of the resolution of your report. The Church may require a Church Worker who commits workplace violence to participate in counseling and submit a fitness for duty certificate from a health care professional, satisfactory to the Church, as a condition of continued employment or service and/or before allowing the Church Worker to return to the workplace.

Right to Monitor/Inspect

The Church reserves the right to enter and inspect all work areas (including but not limited to offices, desks, cabinets, computer files, storage rooms and lockers) for any reason, with or without notice and whether or not the space has been secured by the Church Worker. The Church may also conduct audio and video surveillance of its premises where permitted by law.

The Church may monitor telephone conversations and text and e-mail communications at work or on Church equipment, may retrieve voice and electronic messages in the process of monitoring customer service and may use the results to determine if any of its policies have been violated.

No Retaliation

Employees who report or participate in an investigation of discrimination, harassment, workplace violence, any other policy under Our Standards, or who seek protection under U.S. or local laws governing employment and/or working conditions, must not be subjected to any form of retaliation. Co-workers must not retaliate against an employee who reports an incident of discrimination, harassment, or workplace violence.

1.5 Doing Business with Others

General Guidance

Church Workers should develop relationships with other parties, such as vendors, suppliers and other contractors (collectively referred to as “Contractors”), in fair, honest, lawful and ethical ways. Anything that would be improper for us to do ourselves is improper for someone else to do for us. For example, if it would be inappropriate for you to give a gift to a Contractor, it also would be inappropriate for you to ask someone else to give the gift.

Our Purchasing Practices

Purchasing decisions, including selection of Contractors, should be based on the best value received by the Church by proper means. Contractors should be evaluated in fair and objective ways, such as obtaining competitive bids, verifying quality and service claims and confirming the contractor’s financial condition and adherence to honest business practices. Purchasing decisions should be properly approved. Purchases and other relationships with contractors should be by written agreement or order, setting forth clearly all necessary terms and conditions. Payments should be lawful, accurately recorded, traceable and consistent with the Church’s established financial policies.

1.6 Avoiding Conflicts of Interest

General Guidance; Disclosure of Potential Conflicts

You should not engage in any activity that creates a conflict of interest with your Church responsibilities. A conflict of interest arises when Church Workers either use their Church position or employment for personal or family gain or to further personal or family interests that are inconsistent with the Church’s interests. You should promptly report to your supervisor, by completing a Disclosure of Possible Conflict of Interest form, any situation that constitutes a potential or actual conflict of interest involving you or anyone else. Full, complete and immediate disclosure reduces the likelihood that potential conflicts will become actual conflicts and protects you from allegations that you acted improperly. You should complete the Disclosure of Possible Conflict of Interest form at defined intervals or whenever your circumstances change.

Financial Interest in a Contractor or Business with

Conflicting Interests

You should not participate in making, or attempt to influence, Church decisions regarding actual or potential Contractors or other third parties in which you — or a family member or a person with whom you have a close personal relationship — have any financial interest. For this purpose, “family members” include any parent, spouse, child, sibling, first cousin, niece, nephew, uncle, aunt, grandchild, grandparent, father- or mother-in-law, brother- or sister-in-law, son- or daughter-in-law and any step family member. Close personal relationships include dating, business, or financial relationships, or any other close personal friendship or joint interest an objective party could reasonably conclude might influence your judgment. A financial interest could include an investment or ownership interest (other than investments in securities commonly traded in the public markets) or an employment or consulting relationship.

Offices and Directorships; Outside Employment

Before accepting a position as an officer, trustee or director of any legal entity, including nonprofit entities, you must advise your department or area HR manager, who may consult with OGC to determine if acceptance of such a position would constitute an unacceptable conflict of interest with the Church. The same procedure applies if you are asked to accept a public position or political appointment or if you decide to run for public office.

Second employment is a potential conflict of interest and must be disclosed on the Disclosure of Possible Conflict of Interest form. Second employment will not be considered an actual conflict of interest as long as the employee’s work schedule does not have to be adjusted to accommodate the second employment and the second employer is not a Church operating entity (Corporation of the President, Corporation of the Presiding Bishop, LDS Family Services, or other related entity throughout the world) or does not do business with Church operating entities. Employees are not permitted to maintain multiple, concurrent positions with Church operating entities. An employee should not receive compensation in addition to his or her normal pay for performing services for a different department, such as appearing in a movie production of the Audiovisual Department or performing translation services. Time

spent in rendering such services should be considered as hours worked in the primary department.

If an employee is in a position to influence the amount or nature of the business relationship between Employer and his or her secondary employer, the employee has an actual conflict of interest that must be disclosed and resolved.

Fully benefited employees may accept second employment with a Church-affiliated entity, such as Brigham Young University, Zion’s Securities, Bonneville International and Deseret Book, only if the second position is excluded from benefits.

Employees must be careful not to use Church facilities or equipment for second employment. Second employment must not be carried out during hours the employee works at his or her Church employment.

Receiving Gifts, Favors and Entertainment

The receipt by Church Workers of gifts, favors and entertainment (collectively referred to as “Favors”) from Contractors, potential Contractors, or those whose interests may be affected by Church actions can create a conflict of interest. Favors include anything of value, including cash, gift certificates, discounts or favorable terms on purchases, loans, services, prizes, transportation, meals, entertainment or athletic event tickets, use of vehicles or vacation facilities, stocks or other securities, personal, home or office items, or home improvements. The potential list is nearly endless — these are just examples.

Church Workers should not request or hint for a Favor from contractors or others who seek to do business with the Church. Favors offered to Church Workers and their family members generally fall into either of two categories:

Usually Permissible

Favors from any one source in a calendar year with a combined market value less than \$100 (or other, lower established level for your country or area) are usually permissible, if lawful and not otherwise contrary to the interests of the Church. (This does not include a gift of cash or its equivalent in any amount, which is always wrong, as noted below.) Examples in the “usually permissible” category may include:

- Occasional, reasonable meals with a business associate even if Church business is not discussed.
- Sports, theater and other cultural events, when the giver accompanies you to the event.
- Discounts or other benefits offered by the Contractor to the public or to all of its customers.
- Common business gifts of nominal value such as promotional or commemorative items (pens, calendars, sweatshirts, candy, etc.). (Where practical, share such items with others in the office.)

Always Wrong

You may never accept or request:

- Cash or cash equivalents (gift cards or certificates, loans, stock, etc.) in any amount.
- Any Favor that would be illegal or result in any violation of law.
- Any Favor with an understanding for you to do anything in return.
- Any Favor that is unsavory is sexually oriented or would reflect poorly on the Church.
- Any Favor you know or believe would violate the standards of the giver's employer.

If you are offered a Favor that does not clearly fit into one of these two categories, ask your area or departmental HR manager or your supervisor whether it is appropriate to accept it, or contact the Standards Line.

If you are offered a Favor that violates Our Standards, you should promptly inform your supervisor and your HR manager. Follow their direction in responding to the person who offered or gave the Favor to you. You should also promptly return any cash or cash equivalent. If you work in an area where offers of Favors inconsistent with Our Standards are common, you should inform all Contractors with whom you deal of the applicable Standards.

Use of Church Property, Facilities or Assets

You should not use the Church's property, facilities or assets for personal benefit or financial gain. For

example, you should not:

- Engage, during your working hours, in business activities that are not a part of your assigned duties.
- Display merchandise, solicit co-workers, distribute literature or participate in fund-raising for personal interests (business, political, charitable or other) during work time or in work areas.
- Use Church-owned computers, copiers, phones, or other equipment for personal benefit or financial gain.

1.7 Avoiding Bribery, Kickbacks, Fraud and Other Misconduct

Just as it is improper to accept Favors that may influence your work for the Church, you should not provide improper Favors to people who work for entities with which the Church interacts, such as governmental authorities or agencies or private Contractors. You must not provide any Favor — anything of value — as a bribe, “kickback” or other benefit designed to influence or compromise the conduct of the recipient. You also should not arrange to do it indirectly or allow anyone else to do it.

Examples of inappropriate Favors include:

- Giving any money, gift, loan, favor or thing of value to influence decisions or judgment.
- Giving a rebate, kickback or other Favor for obtaining favorable treatment for the Church.
- Providing improper Favors to a public official indirectly, such as by benefiting someone they suggest or with whom they have a close personal relationship.

The laws of the United States (applicable globally to Church activities) and of virtually all countries where the Church operates prohibit bribes or Favors to public officials. “Public officials” include government officers or employees, political candidates, political parties and their officials, employees of government-owned businesses and officials or employees of international organizations such as the United Nations or European Union. A violation of these anti-corruption laws is a serious criminal offense that can result in criminal prosecution, substantial fines and imprisonment,

damage to the good standing of the Church and termination from employment with the Church or involuntary release from missionary or volunteer service. Consult the Church's U.S. Foreign Corrupt Practices Act Guidelines, available on the Intranet and from OGC, for help in compliance in this regard.

You should immediately report a possible or actual violation relating to providing Favors to other persons in connection with Church matters.

1.8 Making Accurate Records and Reports

Our records, reports and other means of keeping information or providing it to others should be accurate and honest. Applicable document retention policies should be followed in retaining, discarding or destroying documents.

1.9 Protecting Property and Information

Proprietary and Personal Information

The Church produces valuable ideas, strategies and other operational information that is not released to the general public ("Proprietary Information"). Such proprietary Information is owned by the Church and may be sacred or otherwise confidential. The Church protects this information from use by outsiders. Personal information is also confidential and privacy of such data may be protected by law. Examples of Proprietary Information are:

- Administration and operations information and strategies
- Growth and development information and projections
- Anticipated building plans for temples, meetinghouses and other Church facilities
- Financial information
- Personnel records
- Statistical and membership records information
- Research and technical data
- Intellectual property such as patents, trademarks (including key identifiers such as the Church's name and logo, The Book of Mormon and Liahona), service

marks and copyrights. (Policies relating to the use the Church's intellectual property are established by the Church's Intellectual Property Division ("IPD").)

- Trade secrets of any kind

You should protect the confidentiality of and the Church's legal interests in the Church's Proprietary Information. Only reveal Proprietary Information to another Church Worker who has a specific need to know to perform his or her work. Sharing Proprietary Information with a third party may only be done with management's approval, usually under a written confidentiality agreement or other arrangement approved by OGC or IPD. You may be required to sign a document acknowledging these obligations.

During the course of your employment with or service for the Church, you may generate work product such as written materials, plans, computer programs or codes, photographs, artistic creations, or inventions ("Work Product"). All Work Product is owned solely by the Church and should be returned at any time upon request or when you stop providing services for the Church, whichever first occurs. Each employee must sign a Confidentiality Agreement and Assignment of Work Products Agreement, which contains a definition of confidential information and sets forth the employee's obligation to not reveal such information except as may be required by the employee's job responsibilities. Employees should be diligent in safeguarding information entrusted to them so as to avoid even the accidental disclosure of confidential information.

Use of Proprietary and Confidential Information and Intellectual Property of Others

We respect the proprietary and confidential information and intellectual property of others. Accordingly:

- Do not use any proprietary or confidential information (including computer records) from prior employers.
- Do not load any unlicensed software on any Church computer.
- Do not accept or use proprietary or confidential information of another except under an agreement approved by your management and IPD.

- Do not use the trademark or service mark of a third party, without approval of your management and the IPD.
- Do not use or copy copyrighted documents and materials (including computer software, audio, video and off-the-internet or off-the-air recordings) without written permission from the copyright owner. Virtually all movies, TV shows, books, magazines, comics, newspapers, etc. are copyrighted. Copying or using these materials without permission is a form of theft. If you have questions in regard to copying or use, ask IPD.
- Do not request an applicant's social security number, date of birth, or driver's license number ("Personal Information") until we have extended a job offer or requested from the applicant permission to conduct a criminal background check, credit history, or driving record check.
- Do not use Personal Information obtained during the hiring process for any reason other than determining whether we will hire the applicant as an employee. Prohibited uses include marketing, profiling, or reselling the information.
- Do not share confidential or Personal Information collected during the hiring process except with those you have a legitimate need to know it.
- Unless required by law, do not retain information collected about an applicant for more than 2 years if the applicant is not hired during the 2-year period. Destruction of Personal Information should be done in a secure manner that reasonably protects against public dissemination of the information.

1.10 Keeping Political Activity Personal

The Church does not endorse or oppose any political candidates or parties. Church contributions, either direct or indirect, to political parties or candidates are illegal in most jurisdictions and prohibited by Church policy. As an individual you may participate in the political process and make voluntary contributions to candidates and political causes of your choice. In such political involvement, you should make clear you do not act or speak for the Church. You should not use Church resources, such as Church email and other

communication systems, for participation in any political campaign or process. You also should not engage in political activities during your Church work time or on Church property.

1.11 Responding to Government Inquiries or Investigations

You should contact OGC promptly upon receiving a request from a government agency or official that either (a) is for Church Proprietary Information or (b) is not routine in nature. Any information provided to a governmental agency or official should be completely honest and truthful. Be sure that records relevant to the government inquiry are preserved.

1.12 Applying Additional Standards Relative to Global Operations

Trade Restrictions and Export Controls

The United Nations, the European Union and individual countries, such as the United States, may impose restrictions on dealings with certain countries, entities or individuals. Trade restrictions take many forms, including bans on transfer of goods, services or technology. Before having dealings with governments, financial institutions, firms or individuals that might be on the list of sanctioned countries, contact OGC.

U.S. Anti-Boycott Regulations

You should not take any action, furnish any information or make any declaration that could be viewed as participation in an illegal foreign boycott of Israel or other countries. Illegal requests may be very subtle, such as requests regarding the nationality, national origin and/or religion of employees or representatives who will be sent to a country, or regarding the origin of goods being shipped, the origin of other parties in a transaction, or other similar terms.

OGC's Guidelines Concerning the U.S. Anti-Boycott Regulations, available on the Intranet, contains more detailed information. If you have questions, or if you receive a request to take action or give information that is boycott-related, notify OGC immediately.

Customs

As a general rule, the importation into a country of

Church materials and products is subject to various customs fees and regulations, such as import duties, value added and excise taxes and the requirement to use the proper valuation of goods imported. If you are involved in this process, you should ensure that imports comply with these fees and regulations and that information provided to customs and tax officials, including the declared valuation of imported goods, is accurate and truthful. If you have questions, contact OGC before declaring a value.

1.13 Updating Our Standards

The Church may change Our Standards of Conduct and other HR Policies over time in order to meet changing needs or requirements. Our Standards are not intended to create contractual or other legal obligations on the Church.

2. General Employment Policies

2.1 Introduction

Each Church Worker should review and is expected to follow Our Standards of Conduct and Other Human Resource Policies. Church Workers should direct any questions they may have about these policies to their supervisor or Human Resource representative. These policies may be changed from time-to-time at the discretion of the Human Resource Department. Our Standards of Conduct and Other Human Resource Policies do not imply any contractual rights. Instead, they represent principles to be followed by all Church Workers, including managers and supervisors. All previously issued Human Resource policies or codes of conduct and any inconsistent policy statements are superseded.

2.2 At-Will Employment

The employment relationship is based on mutual respect and consent and continues only as long as both parties find the relationship to be satisfactory. Each employee is free to terminate his or her employment whenever the employee feels it is in his or her best interest to do so. Likewise, Employer has the right to terminate the employment relationship at any time, with or without cause. This is known as "employment at will." Nothing in Our Standards of Conduct and Other Human Resource Policies nor any other oral or written

statement to an employee may be viewed as creating or implying a contract of employment for any specific period of time. An agreement for employment for a specific period of time can be established only by a written document signed by both the employee and the human resource director for the department.

2.3 Advertising for and Recruiting Applicants

The Human Resource Department will assist departments in filling job openings and recruiting qualified temple-worthy individuals without regard to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or any other legally protected categories that apply to the Church. It is the responsibility of those involved in the hiring process to select candidates who meet or exceed the job requirements and all other qualifications outlined herein and to carefully document the selection process. Information about job openings will be posted at Employer's headquarters, on its Web site (www.employment.lds.org) and in other locations necessary to attract qualified candidates. Posting should be done in such a manner that a wide variety of potential applicants are exposed to the posting. An applicant is someone who has followed Employer's procedures by completing an online application for a specific, open position. For Internal Transfers, see Section 5.1 below

Interviews

If requested by the hiring department, the Human Resource Department will conduct preliminary screening interviews and refer selected applicants to the hiring department. Department management will conduct the final interviews and make the hiring decision.

Applicant Reimbursement

Prospective employees invited from outside the local area for job interviews by Employer may receive reimbursement for the cost of airfare or approved mileage when a personal car is used, car rental (when appropriate) and food and lodging expenses during the time required for the visit. Costs or reimbursements will be charged to the department concerned. When feasible, transportation should be arranged in advance through Church Travel Services.

Worthiness and Employment Checks

Before an employment offer is made, the prospective employee will be asked to verify his or her temple worthiness. A human resource representative may check with the applicant's ecclesiastical leader to determine whether the applicant is worthy of a temple recommend. The applicant's previous employment history and/or credit history may also be verified. Sensitive information will be handled confidentially.

Extending the Job Offer

The hiring department and the human resource representative will agree on the salary in accordance with established guidelines and will determine who will extend the job and salary offer to the selected candidate.

2.4 General Conditions of Employment

Misrepresentations or Omission of Information

Misrepresentations or omission of information during the application process may disqualify an applicant. If a misrepresentation or omission is discovered after an applicant is hired, he or she may be subject to immediate dismissal.

Verifying Authorization to Work

Before new employees begin work, they must complete all required employment eligibility forms (e.g., the I-9 Employment Eligibility Verification form in the U.S.). The Human Resource representative reviews and verifies eligibility to ensure it is complete. All employees must be authorized to work in the country in which they will be employed. All conditions of immigration laws must be met.

The Church does not sponsor immigrants (permanent residence). Only in the case of substantial benefit to the Church and at the request of a Church department and not as an accommodation to the employee or prospective employee will the Church consider sponsoring non-immigrant visa applications. All Church sponsored applications and associated requests for services of outside legal counsel for non-immigrant work permits or visas for employees or prospective employees must have the prior written approval of 1) the applicable Director for Temporal Affairs or Managing Director of the department in which the

employee will work, 2) the Office of General Counsel, and 3) the Director, HR Legal Services.

The costs of approved petitions for and renewals of non-immigrant work permits or visas for employees, prospective employees and their family members, including travel costs associated with the processing of the work permit or visa, will be paid by the requesting department.

Corporation of the President of The Church of Jesus Christ of Latter-day Saints and Corporation of the Presiding Bishop of The Church of Jesus Christ of Latter-day Saints will hire foreign students in the United States only in positions relevant to their educational programs and in full compliance with all applicable immigration laws.

Hiring Individuals under 16 Years of Age

Individuals under 16 years of age will not be hired. Employer complies with all applicable labor laws.

Hiring or Transferring Ecclesiastical Leaders

Applicants or existing employees who hold the positions of Area Seventy, stake presidency member, or bishop and who would be required to relocate or otherwise disrupt their Church calling to accept employment or transfer may be considered for employment or transfer only after the situation has been reviewed with the appropriate presiding Church authority. The Office of the Quorum of the Twelve should be contacted if the individual is an Area Seventy or a stake president. If the individual is a bishop or stake presidency counselor, the situation should be reviewed with the stake president under whose jurisdiction the individual is serving. Such contact should be made only if the individual is a viable candidate for the position.

Reemployment after Retirement

Employees who have activated their retirement from Employer (those who have applied for and are receiving a monthly retirement benefit) are not eligible for rehire. Employees who have retired from Church Affiliated Entity are also not eligible to be rehired by the COP or CPB. Terminated employees who are eligible for and accept mandatory lump-sum distribution of their Master Retirement Account benefits are eligible for reemployment. Employees who retire may not return to

employment as a contingent worker through an employee leasing agency.

Exit Interviews

When an employee terminates employment, department management should arrange for an exit interview between the employee and a human resource representative. If a human resource representative is not available, a member of management at least one level above the employee's immediate supervisor should conduct the interview. The purpose of the exit interview is to expedite the checking-out process; to obtain the terminating employee's ID badge, parking pass, keys, computer passwords and such; and to ascertain the employee's reason for leaving Church employment.

After the exit interview, the department human resource director or manager should make a decision on rehire eligibility and insert a note on that decision in the employee's records. Employees who have been terminated for cause should be marked as ineligible for hire. Exceptions to this policy must be approved by the Director of Employee Relations.

Second Employment

1. No part-time employee of a Church Operating Entity (CPB, COP, etc.) shall have concurrent employment with any other Church Operating Entity or with any Church-affiliated Entity (BYU, Deseret Book, etc.) without the prior written approval of the Managing Director, HR.

2. Full-time employees of a Church Operating Entity may have concurrent part-time employment with a Church-affiliated Entity if it is consistent with other Church policies, including the Conflict of Interest Policy. Full-time, salaried employees of a Church Operating Entity may perform work for another department or another Church Operating Entity, but without additional compensation, so long as such work is performed consistent with other Church policy, including the Conflict of Interest Policy.

3. If an individual, whose employment with a Church Operating Entity or a Church-affiliated Entity terminates during the current ACA measurement period, is thereafter hired by a Church Operating Entity into a part-time position, that employee cannot average thirty

or more hours of service per week when all the hours worked during the measurement period for Church-affiliated Entities and Church Operating Entities are combined.

4. If the employment of a full-time medically benefitted employee of a Church Operating Entity or a Church-affiliated Entity terminates, that employee cannot have part-time employment with a Church Operating Entity for at least twenty-six weeks after the termination of the prior full-time employment.

However, the restrictions described in paragraphs 3 and 4 above shall not apply if an employee described in these paragraphs is hired between four and twenty-six weeks from the referenced termination and the duration of the prior employment is shorter than the "break in service" (the time between such termination and the date such employee is hired by a Church Operating Entity).

2.5 Employment of Relatives and Dating

Employees in close or family relationships may not be employed in proximate supervisory relationships or locations. They may not be employed in positions when there would be cause for management concerns about preferential treatment in hiring, promoting, allocating salary, assigning duties, arranging schedules, disciplining, or terminating. This policy also applies to General Authorities in the scope of their administrative assignments.

Single employees in proximate supervisory relationships who choose to date one another must disclose this relationship to the HR Director of their department. The Employer reserves the right to transfer one or both employees to another position, department, or location.

Definitions:

1. "Close or family relationship" includes near relatives (parents, children, siblings, first cousins, nieces, nephews, uncles, aunts, grandchildren and grandparents); persons related by marriage (spouses, daughters-in-law, sons-in-law, parents-in-law, brothers-in-law, sisters-in-law); persons dating one another; and persons living in the same home.

2. The phrase "proximate supervisory relationships"

refers to reporting relationships within the same department, where one employee has the authority to make decisions about the terms and conditions of the other's employment.

3. The phrase "proximate locations" means in the same department and close geographic location where the employees would regularly be interacting with each other on work matters.

Family Members at the Work Site

Except for brief visits, employees should not bring family members to the workplace. Employees should not have any of their work tasks performed by a family member.

2.6 Dress and Grooming Standards

Employees are expected to dress modestly and in a conservative, professional, business-appropriate, manner that is consistent with the customs and standards of the country in which they work. Extreme clothing of any kind or style should be avoided. Shoes should be in good repair and shined. Athletic or similar shoes, regardless of color, should be avoided. Clothing should be clean, well-cared for and neatly pressed. Denim and other casual fabrics and materials should be avoided. The fit and style of clothing for both men and women should be modest. The following guidelines should be followed:

Women

Professional, business-appropriate skirts or dresses of at least knee length (Skirts with immodest slits are inappropriate.)

- Casual sandals or flip-flops are not acceptable
- Pants, pantsuits and split skirts are not acceptable

Men

- Ties and suits or sport coats and dress slacks
- White or light-colored dress shirts
- A suit or sport coat should be worn when leaving the department area. (On a hot day, it is appropriate to remove the coat after leaving the building.)
- Casual pants (such as Dockers®) are not acceptable

In situations where dress standards may need to be modified for modesty, safety, health, or other work-related reasons, individual departments may submit modified guidelines to the Director of Employee Relations for approval.

Extreme hairstyles are not acceptable. Hair should be clean and neatly combed. Sideburns below the earlobes and beards are not acceptable. Mustaches, if worn, should be neatly trimmed and not extend beyond the corners of the mouth. Men's hair length should be above the collar.

High standards of personal hygiene and cleanliness are expected. Cologne and perfume should be used sparingly, with sensitivity to allergies of co-workers.

Safety Clothing

In accord with federal or state OSHA safety regulations, certain positions require the use of specific safety clothing or protective equipment, such as steel-toed shoes, hard hats and aprons. Departments should consult the Church's Safety, Health and Environmental Manual for guidance on situations where such equipment is necessary. The department, at its own expense, will provide the required clothing or protective equipment. If the equipment or clothing is very personal in nature and may be used away from work, such as prescription safety glasses or safety shoes, departments may establish a policy requiring employees to help with the cost of such equipment or clothing. Departments should consult with the Risk Management Division to ensure the appropriateness of the supplied clothing.

Uniforms

If a division or department decides that uniforms are required for employees, the uniforms will be provided and maintained by Employer, in accord with applicable state or local law.

Travel

As a security measure, employees may wear business casual attire when traveling internationally by air.

2.7 Technology Resources Use and Internet Communications Policy

This policy applies to Church Workers (collectively

referred to as “users”) in use of Employer’s Technology Resources or in performance of Employer’s work. Employer’s Technology Resources are for Employer business-related purposes and are provided to certain users to assist them in performing their job duties or assignments. Each user should use Employer’s Technology Resources in a manner that increases productivity, enhances Employer’s public image and respects others.

All activities and conduct in use of Employer’s Technology Resources must maintain the highest standards associated with the sacred nature of the Church’s work and mission and be in accordance with Employer’s policies. Failure to do so may lead to disciplinary measures, up to and including immediate termination of employment, contract, or assignment.

Technology Resources Definition

Technology Resources consist of all electronic devices, data, software and means of electronic communication, including but not limited to computers of all types; communication devices and equipment such as telephones, mobile phones, smart phones, voicemail and video conferencing; data and video recording and storage devices; peripheral devices such as printers, modems, fax machines and copiers; network, infrastructure and electronic communication devices; all associated operating and application software; and all associated files and data. This policy may be modified or changed at Employer’s discretion as new technology becomes available or as operational needs change.

Use

Employer’s Technology Resources are to be used by users only for the purpose of conducting Employer business, with the exception of occasional and incidental personal use that does not interfere with the intended function of the equipment or decrease personal productivity, does not increase maintenance or other costs and does not involve inappropriate activity or conflict of interest. Employer assumes no liability for loss, damage, or misuse of any personal data or communications stored in or transmitted over Employer’s Technology Resources. Employer strongly discourages users from storing any personal data on Employer’s Technology Resources.

Improper Use

It is a violation of Employer’s Technology Resources policy for any data composed, sent, or received via Employer’s Technology Resources to contain content that may be reasonably considered offensive or disruptive. Material that is fraudulent, harassing, sexually explicit, profane, obscene, intimidating, defamatory, or otherwise unlawful or inappropriate may not be sent by e-mail or other forms of electronic communication (e.g., social media, bulletin board systems, newsgroups, chat groups) or created on, displayed on, or stored in Employer’s Technology Resources. Users encountering or receiving this kind of material should immediately report the incident to their HR representative.

Obscene, Pornographic, or Sexually Related Material

It is an absolute violation of Employer’s Technology Resources policy for any user using Employer’s Technology Resources to intentionally receive, send, compose, display, or access in any manner any material that is obscene, pornographic, or sexually related (including but not limited to images containing sexually provocative nudity). Any user who is found to have violated this provision of the Employer’s Technology Resources policy shall be immediately terminated from employment or shall have their contract or assignment immediately terminated.

Other Prohibited Uses

Users may not use any of Employer’s Technology Resources for any illegal purpose, in a manner that violates any Employer policy or that is contrary to the best interests of Employer, in any way that discloses confidential or proprietary information of Employer or third parties, or for personal or pecuniary gain. Use of Employer’s Technology Resources to engage in any form of gambling or online gaming is also prohibited. Users may not attempt to access any Employer’s Technology Resources without authorization nor exceed authorized access. Users may not use deceptive methods to gain access nor attempt to compromise security controls without explicit authorization.

Employer Access to Technology Resources

All messages, including personal messages, sent and

received and all data and information stored on Employer's Technology Resources are Employer's property regardless of the content. As such, Employer reserves the right to access all of its Technology Resources at any time in its sole discretion.

Privacy

Users have no reasonable expectation of privacy with respect to any messages or information created or maintained on Employer's Technology Resources. Employer may, at its discretion, inspect all files or messages on its Technology Resources at any time for any reason. Employer may also monitor its Technology Resources at any time to determine compliance with its policies, for purposes of legal proceedings, to investigate misconduct, to locate information, or for any other purpose.

Passwords

Certain of Employer's Technology Resources can be accessed only by entering a password. Passwords are intended to prevent unauthorized access to information. Users are expected to maintain their passwords as confidential. Users must not share passwords and must not access coworkers' systems without express authorization. Passwords do not confer any right of privacy upon any user. Thus, even though users may maintain passwords for accessing Technology Resources, users shall not have any reasonable expectation that any information maintained on Employer's Technology Resources is private.

Deleted Information

Deleting or erasing information, documents, or messages maintained on Employer's Technology Resources is, in most cases, ineffective. All users should understand that any information kept on Employer's Technology Resources may be electronically recalled or re-created regardless of whether it may have been "deleted" by a user.

Internet Communications

This policy provision covers all publicly accessible Internet communications, including blogs, newsgroups, discussion forums, social networks, e-mail distribution lists and other forms of news media, whether these media forms are used for personal or work purposes as

that use relates to, affects, or reflects upon Employer. Authorized representatives of Employer may access and monitor Employer-owned systems and, if needed, disclose records relating to their use.

Any information published online must be shared with caution because it becomes widely available to the public. Users have an obligation to protect confidences, respect others' privacy and otherwise act responsibly as they share information about the work they do and their job.

Prohibited Practices

The following limitations are applicable to all Internet communications regarding Employer:

Never disclose confidences. The duty of confidentiality extends to current and past work assignments and all information subject to nondisclosure agreements. Consult your supervisor before publishing information when confidentiality may be an issue.

Do not identify or post pictures of vendors, customers, employees, other interested parties, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.

- Never disclose confidences. The duty of confidentiality extends to current and past work assignments and all information subject to nondisclosure agreements. Consult your supervisor before publishing information when confidentiality may be an issue.
- Do not identify or post pictures of vendors, customers, employees, other interested parties, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.
- Never copy or post copyrighted or trademarked materials or images without the owner's permission. This includes intellectual property of vendors, customers, Employer and The Church of Jesus Christ of Latter-day Saints.
- Do not use Employer's time or systems for fundraising; for partisan political purposes; to

endorse, support, oppose, or otherwise comment on the election or candidacy of any candidate for public office; or to advocate for the enactment or defeat of any legislation, unless it is directly and clearly within the scope of your job duties and assignment.

- Do not publish material that is obscene, profane, defamatory, libelous, threatening, hateful, harassing, or abusive to another person or entity.

Required Disclaimer and Comments

You may state that you work for or serve Employer. If you do so, the following disclaimer is required: "The views expressed here are the opinions of [employee's name] and do not necessarily reflect the views of [Employer] or The Church of Jesus Christ of Latter-day Saints." Comments made on blogs can be traced back to the Church. Be cautious about commenting anonymously on blogs.

Updating Information While on Duty

A supervisor may permit a user to update his or her blog or other Internet forum while at work if the information is relevant to the user's duties. Personal Internet activity should not interfere with the work duties or responsibilities of the user.

2.8 Work Schedules

Employer's offices will be open as necessary to support the Church's worldwide operations. The hours of operation for each division and for each employee will be established by the department as necessary to meet these needs.

Standard Workweek and Workday

The standard workweek begins Saturday at 12:01 a.m. and ends the following Friday at 12:00 midnight. The typical workweek is five eight-hour days but may vary by location as dictated by clear business need with prior approval of the department's managing director.

Lunch Breaks

A minimum of a 30-minute unpaid lunch break is authorized for non-exempt employees working more than five hours in a shift or day. Non-exempt employees should not be permitted to work during their lunch break and the lunch break should not be taken at the

end of the workday. Employees may be asked to schedule lunch breaks to accommodate department needs. The timing of lunch breaks is dictated by the laws of some states. Employees and management should comply with such laws, including accurately recording start and stop times for lunch breaks in states where such recordkeeping is required.

Work Breaks

Nonexempt employees are authorized a 10-minute paid break for each four hours they work. These breaks should be scheduled with the employee's supervisor to accommodate department needs. The length and timing of breaks may vary according to local or state laws. An employee should not move one or both of these breaks for the purpose of extending the lunch break, shortening the workday, or taking one 20-minute break.

Van or Car Pools

Employees participating in van or car pools are expected to work a standard workday and workweek. Some variance from the department's expected arrival and departure times may be approved by the employee's department management.

2.9 Work-at-Home

Work-at-home, telecommuting, or similar employment is not authorized. If employees have unusual needs that can be met only through this type of employment, the Human Resource Department must give prior written approval and the arrangement must be properly documented. This general policy does not prevent exempt employees from taking necessary work home to be completed after hours.

2.10 Job Descriptions

Job descriptions are used to establish the essential functions of each job within Employer's organization and to assist in determining the value of each job. Job descriptions are necessary to assign wage and salary levels. A current, approved job description for each job must be filed with the Human Resource Department.

2.11 Employee Activities

Group activities that support and enhance the overall goals of the Church are encouraged. Such activities should be approved in advance by the department head.

Departments are encouraged to hold regular (usually weekly) devotionals consisting of a song, prayer and spiritual thought. Each department head should determine the frequency of devotionals. Employees are invited, but they are not required to attend.

To facilitate social activities, departments may establish social groups. Assistance in establishing social groups will be provided by the Human Resource Department. Employees may be invited to participate in and voluntarily contribute to the social group. If desired, social groups can request that the payroll services section withhold monthly voluntary contributions from the pay of employees desiring to participate in the social group. All activities planned by social groups should be consistent with the standards of the Church. Activities should not be frequent, lengthy, or interfere with family or ward activities.

The Human Resource Department is responsible for coordinating special events that affect all employees at Church headquarters. Activities involving more than one department should be cleared with the Director, Employee Relations, of the Human Resource Department.

2.12 Criminal Convictions

Employer will not employ individuals with prior criminal convictions who pose an unacceptable risk to the Church or its employees, members, and visitors. Prior criminal conviction is not an absolute bar to employment and all qualified applicants will be considered for employment. Each application is reviewed and a decision is based on the specific merits of each individual case.

When applying for a job, an applicant must disclose all prior criminal convictions. The Church may also conduct a background check by an outside agency to document any prior criminal convictions. If an applicant has a prior criminal conviction, the department business partner should conduct an assessment and make a recommendation. This individualized assessment will include a number of factors including:

- The nature and gravity of the offense;
- The facts or circumstances surrounding the offense;

- The time that has passed since the offense and/or completion of the sentence;
- The nature of the job held or sought;
- The number of offenses for which the individual was convicted;
- Age at the time of conviction, or release from prison;
- The individual's employment history before and after the offense including the length and consistency of employment;
- Rehabilitation efforts, e.g., education/training; and
- Employment or character references and any other information regarding fitness for the particular position.

In no event may an employee who has been convicted of a sex offense or whose name is on a government sex offender registry be permitted to work in a position that would put them into proximity to children or youth.

The Director of Employee Relations, Human Resources Department will review and determine whether the individual may be employed.

3. Compensation and Benefits

3.1 Compensation

Employer's compensation program is designed to compensate employees fairly, while at the same time acknowledging a measure of consecration by those who earn their living in service to the Church. Compensation ranges are based on the nature of the position. Employees working in similar positions will receive comparable compensation, regardless of gender, national origin, race, ethnic status, age, or disability. Compensation may vary based on experience, performance, location and/or length of service.

Salary Basis Policy

Employer pays employees in accordance with the Fair Labor Standards Act (FLSA) and applicable state laws. Non-exempt employees in the United States will be paid at least minimum wage for all hours worked and will be paid at one and one half times their regular rate of pay for all hours worked over 40 hours in a workweek. (In

states where daily overtime is required, non-exempt employees shall be paid daily overtime.) Supervisors should never require, encourage, or permit non-exempt employees to work off the clock. Employees who are exempt from these requirements must qualify for an exemption under the FLSA and state law.

3.2 Overtime, Callback Pay, Call-in Pay and Shift Differentials

Employees are encouraged to give a full measure of service during the time they are at work. Supervisors and managers are encouraged to review work schedules and demands so as to properly use the time employees are on the job. Overtime work and callbacks should be requested only when work cannot reasonably be accomplished within the allotted hours.

Exempt employees are expected to work the time necessary to accomplish their assigned responsibilities. Exempt employees are not eligible for overtime, callback, or shift differential.

Overtime

Nonexempt employees, as defined in the FLSA and state law regulations, who work overtime will be paid at a rate of at least one and one-half times their regular rate of pay for overtime hours worked during that workweek. Overtime is defined by the laws of the state in which the employee works. Usually, overtime is working either more than 40 hours in one week or more than 8 hours in one day. The following guidelines will assist both employees and supervisors in managing work time:

1. Any overtime work by an employee must be approved in advance by the supervisor. If an employee works unapproved overtime, the employee will be paid overtime pay but may be subject to work-related discipline.
2. The actual time that a nonexempt employee works each day is to be recorded in the time collection system. Hours should not be averaged over several days but should be recorded as actually worked each day.
3. When a supervisor anticipates that a nonexempt employee could work more than 40 hours during a workweek, the employee may be given time off

during the same workweek so that he or she works only 40 hours in the week. "Comp time" (time off during another workweek) is not to be given in lieu of overtime pay.

4. Time reported as sick leave or annual leave will not be counted as hours worked when computing overtime pay. Time reported as holiday, funeral leave, Church assignment leave (not including Church assignment leave of absence), part-time public service leave, jury duty leave, marriage leave and miscellaneous leave will be counted as hours worked when computing overtime pay.
5. If a fully benefited, nonexempt employee works on a holiday, instead of giving the employee an alternate day off (see "3.15 Holidays"), the department may elect to pay the employee the holiday pay plus the employee's regular pay. In such a case, both the actual hours worked and the holiday hours would be considered hours worked when computing overtime pay.
6. Non-exempt employees should never be asked to work "off the clock." All hours worked should be recorded in the time collection system so that the employee may receive proper compensation. Any employee who is asked to work "off the clock" should report such requests to his or her division director, to a department human resource representative, or to the Director, HR Legal Services.

Callback Pay

When a nonexempt employee is called back to work at a time other than normal or regularly scheduled working hours, the employee will be paid either for three hours or for the number of hours actually worked, whichever is greater. (Commuting time is not counted in determining hours actually worked.) Callback hours, whether the three-hour minimum or the actual hours worked, are considered as hours worked when computing overtime pay.

When a nonexempt employee is called back to work during previously scheduled annual leave, he or she has the option to reschedule the annual leave (in accord with "Leave Policy and Absentee Policy") or to be paid for both the annual leave and the callback hours. If the employee elects to be paid for both the annual leave and

the callback hours, the annual leave hours do not count as time worked for purposes of calculating overtime.

Call-In Pay

Non-exempt employees who are assigned by their supervisor to be on call for a defined period of time outside their regular work hours (e.g. evenings or over a weekend) and who are required to respond to work-related phone calls, emails, or other requests for assistance (but are not required to return to the office to fulfill their duties) may be entitled to compensation. The type of pay depends on a number of factors including:

- Required response time to calls or email;
 - Employee ability to trade on-call shifts;
 - Scope of geographical travel limitations;
 - Employee ability to engage in personal activities;
- and
- Frequency of calls and emails.

Full Compensation: Employees who are required to respond immediately to calls and emails, who have little flexibility to trade shifts to accommodate personal and family events, who are severely limited in their ability to travel or to engage in other personal activities during the shift, and who take frequent calls or emails during the shift, are entitled to full pay during their call-in shift, including overtime pay, if applicable.

Call-In Pay: Employees who are permitted to respond to calls and emails within a reasonable amount of time, who have opportunity to trade shifts with other employees to accommodate personal schedules, or who are permitted to travel while being available for calls and emails, and who may engage in personal activities during the shift, and whose calls and emails are less frequent, will be entitled to "Call-in Pay" of \$100 for a full week or \$50 for a partial week or weekend. Call-in pay is in addition to pay for actual time worked while on Call-in status.

Shift Differential

Nonexempt employees who work evening or night shifts may be eligible for shift differential pay. Department heads, in consultation with the director of

compensation and benefits in the Human Resource Department, will determine the positions, classifications and schedules that are eligible. Payment of shift differential is calculated on a daily basis. Assuming the following criteria are met, eligible employees will be paid the shift differential for all hours worked. Shift differential will not be applied to absence pay, such as holiday, annual leave and sick leave.

1. At least half of the employee's regularly scheduled work hours for the entire workday must be between 3:00 p.m. and 11:00 p.m. for the evening shift or between 11:00 p.m. and 7:00 a.m. for the night shift.
2. The employee actually works at least half of his or her hours between the applicable hours for the evening or night shifts.
3. If during a workday an employee is regularly scheduled to work and actually works half of the time on one shift and half on another shift, all hours worked will be paid at the higher shift differential rate.

3.3 Workers Compensation

An employee who is injured on the job or who suffers a work-related illness may be eligible for benefits under Employer's workers' compensation plan. State statutes and regulations determine the benefits for which an employee may be eligible. Benefits are paid by or through either the appropriate state agency or Employer's workers' compensation insurance claims administrator. Employer provides workers' compensation benefits that meet or exceed state employment laws and/or regulations.

An employee must immediately report any on-the-job injury or work-related illness, no matter how minor, to his or her supervisor. Failure to do so within the time required by law may result in loss or reduction of benefits and work-related disciplinary action. Supervisors have the responsibility to ensure that claims are promptly reported to the insurance carrier. Department management investigates unsafe work practices and takes appropriate corrective action.

After an on-the-job injury or as a result of a work-related illness, if an employee is unable to perform all of his or her job-related duties, the employee may be

eligible for Temporary Total Disability (TTD) or Temporary Partial Disability (TPD) benefits. The exact nature of and qualifications for these benefits will depend on the law of the state where the employee works.

Most states require a waiting period between the injury and the commencement of TTD or TPD benefits. In some states, if the employee is unable to work for a period of time longer than the required waiting period, benefits will be paid retroactively to cover the waiting period. (For example, in Utah an employee must be unable to work for more than three days before he or she is eligible for TTD or TPD benefits. If the employee is unable to work for more than 14 days, he or she can receive retroactive compensation for the three-day waiting period.) If the employee returns to regular or transitional employment before the retroactive benefit requirements are met, accrued sick or annual leave may be used to cover the waiting period.

An employee receives TTD benefits when he or she is unable to perform the duties of his or her job. TTD produces the following modifications of benefits usually provided by Employer:

1. Recipients of TTD do not accrue annual or sick leave.
2. Holiday pay is not received because TTD benefits are paid instead.
3. The employee must make arrangements to pay his or her portion of any Deseret Mutual Benefit Administrators premiums that come due, unless the employee has also applied for and been approved for long-term disability, in which case the premiums are paid as provided in Deseret Mutual Benefit Administrators' guidelines.
4. Sick or annual leave may not be used to supplement either retroactive lost-wage benefits or TTD benefit payments unless 1) the employee has applied for and been approved for long-term disability benefits, or 2) State maximum TTD benefit is less than two thirds of gross income (supplement not to exceed two thirds gross income).

The time fully benefited employees are away from work on approved workers' compensation leave will be counted as years of service for retirement and annual

leave accrual purposes. Fully benefited employees who are unable to return to regular work duties or begin transitional work within 45 days of their injury should apply for long-term disability.

Temporary Partial Disability (TPD) benefits are paid when an employee can perform some duties but cannot work a full day. When an employee can work a full day but cannot perform all of the duties of the position he or she occupied prior to the injury or illness, the employee may be approved for transitional duty. (See below for information on transitional duty.) When an employee is receiving TPD, the following modifications occur to the benefits he or she would usually receive:

1. Recipients of TPD accrue prorated annual or sick leave based on the number of hours they are able to work per pay period.
2. Prorated holiday pay is received based on the average daily hours worked during the pay period of the holiday. TPD benefits are paid for the hours not worked.
3. The employee must make arrangements to pay his or her portion of any Deseret Mutual Benefit Administrators premiums that come due, unless the employee's pay for hours worked is in excess of the insurance premiums.
4. Sick or annual leave may not be used to supplement retroactive lost-wage benefits or TPD benefit payments.

It is in the interest of Employer and employees that injured workers return to work – either their regular duties or some form of transitional work – as soon as they can safely do so. In working with employees to help them return to work, management should focus on abilities rather than disabilities. These return-to-work activities are coordinated by the Risk Management Division with department personnel and the insurance adjustor. Before an employee is allowed to return to work, the employee must give management notice that he or she is ready to return to work and must provide a fitness for duty certificate from his or her health care provider. The release should list limitations, if any, and should show the date when the employee is cleared to begin working. Workers' compensation lost-time payments stop when the employee returns to work full-

time (either at his or her original job or at transitional duty) or when Employer offers return-to-work activities, even if the employee elects not to return to work. Further details are available through the workers' compensation section of the Risk Management Division.

3.4 Transitional Work

Transitional work reduces the impact of work-related injuries on employees and on Employer by allowing injured workers to receive their regular pay for work activities that are within the restrictions of their medical condition. Transitional assignments may occur within the workgroup or across traditional workgroup boundaries, depending on the doctor's restrictions and available work opportunities.

Transitional work is temporary in nature. Employees may participate in transitional work for up to 90 calendar days, depending on their medical condition and the treating doctor's recommendations. At the conclusion of the transitional work period, employees must return to their regular job duties, request an extension of transitional work, request accommodation of restrictions, or terminate employment.

1. When the employee is released by the doctor to return to full duty without restrictions and is still qualified to perform the duties of the former position, the employee should be reinstated to a position as comparable as possible to his or her former position in terms of pay, job level and benefits.
2. In exceptional circumstances, employees may make a written request for extended transitional work. This request should include a written medical assessment by the treating doctor, an itemized list of current restrictions, a prognosis for recovery and a projected date of maximum medical improvement. It is the injured workers' responsibility to provide the information necessary to consider the request prior to the conclusion of the transitional work period. Requests for extended transitional work will be reviewed by the employee's supervisor, human resource representative, other appropriate management persons and the Risk Management Division.
3. Employees may request reasonable accommodations, if appropriate; to allow them to perform the essential

functions of the job they held when they were injured. The employee should notify the department's human resource representative, who, together with management and the ADA Committee, will consider whether reasonable accommodations can be made. Reasonable accommodations may include transfer to an open job that the employee is qualified to perform. If reasonable accommodations can be made, the employee may return to work. In such cases, the supervisor should notify the workers' compensation section of the Risk Management Division.

4. If an employee is unable to return to regular job duties within 90 days, with or without a reasonable accommodation, if extended transitional work has not been approved, or if transfer to another job is not possible, the employee may choose to resign (or retire, if eligible), or Employer may consider termination of employment where appropriate. If eligible, injured workers continue to receive workers' compensation benefits in accordance with state workers' compensation laws or regulations.

3.5 Employee Benefits

Employer's general policy is to provide employees with a benefit package comparable to the average benefit package offered by comparable employers. From time to time the Compensation and Benefits Division of the Human Resource Department will obtain information on benefit packages from selected companies. Employer's benefit package may then be increased or decreased. The specific benefits available to employees depend on the nature of the employee's position.

Benefits Available to All Employees

All employees are eligible to participate in the following benefits:

1. Parking permit, where available
2. Deseret Book Store periodic discount
3. Health Unit Services (the Employee Health Unit provides basic health services and training for employees at the headquarters facility)
4. Access to the employee cafeteria, if one is on the work site

Additional Benefits Available to Designated Employees

Designated employees (generally those who work full time and occupy an FTE position and who hereafter are referred to as "fully benefited") are eligible to participate in additional benefit programs. These include:

1. Health, dental, disability, group term life, supplemental group term life and accidental death and dismemberment insurance programs.
2. The Thrift Plan. Employees who are at least 21 years of age may be eligible to participate in the Thrift Plan. Specific information about eligibility and participation is contained in the Deseret Mutual Benefits Administrators' Benefits Handbook, available from the Compensation and Benefits Division of the Human Resource Department. Some part-time employees are eligible to participate in the Thrift Plan.
3. The Master Retirement Plan. Specific information about eligibility for retirement benefits and other retirement matters is contained in the Deseret Mutual Benefit Administrators' Benefits Handbook. Some part-time employees are eligible to participate in the Master Retirement Plan.
4. Paid holidays.
5. Paid time off for annual, sick and other types of leave.
6. Membership fees for professional associations. Employer will participate in the cost of dues or membership fees for professional associations when doing so benefits Employer and the employee. Employer will not pay fees for social or civic organizations. Decisions regarding the value of membership in professional associations are made by the department head. The following guidelines apply:
 - a. If Employer requests that the employee participate in a professional organization, if participation is a legal requirement for the employee to perform his or her work, or if the organization or association relates to the primary function of the employee's work assignment and benefits Employer, Employer will pay 100 percent of the cost.
 - b. If the organization or association relates to a

secondary function of the employee's work assignment and is of more value to the employee in maintaining a professional status than providing an avenue of information and services to Employer, Employer will pay up to 50 percent of the cost.

7. A special death benefit. If an active, fully benefited employee (not on disability or on extended leave without pay) dies, in addition to payment of vested, unused annual leave, a special death benefit will be paid according to the following schedule:
 - a. If the employee has worked less than one year, no benefit is paid.
 - b. If the employee has worked at least one year but less than two years, a benefit equivalent to one week's salary will be paid.
 - c. If the employee has worked two or more years, a benefit equivalent to two weeks' salary will be paid.
8. If an employee who has terminated employment returns to fully benefited employment within 12 months of his or her termination date, benefits based on length of service will be restored as if there had not been a break in service. For example, sick leave balances will be restored to the pre-termination amount, annual leave accrual rate will be restored and entitlement to other length-of-service benefits will be determined based on the total length of actual service. If more than 12 months pass between termination and rehire, all non-vested benefits begin as if the employee was a new hire.

Benefits at Termination

Generally, insured benefits continue to the last day of the month in which employment ends. Noninsured benefits end on the last day worked. For information on specific benefits, consult the Deseret Mutual Benefits Administrators' Benefits Handbook. Unused vested annual leave will be paid out at termination.

4. Leave

4.1 Leave Policy and Absentee Policy

Regular attendance is an essential function of each of

Employer's jobs. In most circumstances, if an employee is absent, co-workers must fill in for the missing employee. Employees who are absent, tardy, or leave before completing their regularly scheduled workday are responsible for notifying their supervisors as soon as possible. Normally, notice must be given within two hours of the employee's usual starting time or the employee's early departure from work. Employees who are absent from work and fail to notify their supervisors will be subject to corrective action. Employees who have been absent three consecutive days without notifying their supervisor will be considered to have voluntarily resigned.

All leave and absence events must be accurately and timely recorded in a manner prescribed by Employer. Failure to do so may result in disciplinary action.

Leave Accrual

Annual leave and sick leave hours are accrued each pay period as the employee works throughout the year. Individual increments of annual or sick leave cannot be used in the pay period in which they are accrued. Annual and sick leave hours accrue while the employee is using paid leave, but they do not accrue while the employee is on leave without pay. Employees on an approved leave of absence will have their unused sick leave balance and annual leave earning rate restored when they return to work. Time spent on an approved leave of absence will be counted in determining annual leave accrual rate.

If an employee who has terminated employment returns to fully benefited employment within 12 months of his or her termination date, the employee's unused sick leave hours and annual leave accrual rate will be restored to the levels existing prior to termination. If more than 12 months pass between termination and rehire, the sick leave balance and annual leave accrual rate will be determined as if the employee was a new hire.

Use with Long-Term Disability

Employees who are placed on long-term disability leave (LTD) may use annual or sick leave to supplement their disability leave payments. The amount of leave pay, when added to the LTD benefits and any other offsets considered by Deseret Mutual Benefits

Administrators, may not exceed 100 percent of the employee's normal pay. In such cases, employees accrue a prorated amount of annual and sick leave.

Use with Workers' Compensation Benefits

Employees who are receiving workers' compensation Temporary Total Disability (TTD) benefits may not use annual or sick leave to supplement such payments. In addition, they do not accrue leave while on TTD. Employees receiving Temporary Partial Disability benefits accrue leave at prorated amounts. Employees who are participating in transitional work accrue leave at their usual rates unless they are working less than full time, in which case leave hours are accrued on a prorated basis.

Use in Calculating Overtime Pay

Annual and sick leave hours do not count as hours worked for purposes of calculating overtime pay.

Annual Leave

Annual leave is provided to allow employees time away from work for rest, renewal and time with their families. Employees are encouraged to take annual leave, including at least one increment of five consecutive working days each year.

Accrued annual leave must be scheduled with the employee's supervisor in advance. In granting approval for leave, supervisors should consider the needs of the business as well as the employee's desires. In scheduling several employees' leave periods that conflict or overlap, supervisors should first consider Employer's needs and then attempt to reach an arrangement that is acceptable to the employees involved. In the event such an agreement is not possible, preference should be given on the basis of length of service.

Employees accrue annual leave according to the following schedule:

*Approximate, based on a payroll year of 26 pay periods

There is a cap on annual leave accrual. Employees may accrue up to 200% of their annual leave. If the employee's annual leave reaches the maximum, further accrual of annual leave time is suspended until the

employee has reduced the annual leave balance below this limit. Thus, by way of example, a non-exempt employee who has worked for the Employer for five years will cease accruing additional paid annual leave once the employee has accumulated 240 (i.e., 120 hours x 200%) hours or 30 days. If the employee later uses enough annual leave to fall below the maximum, the employee will resume earning paid annual leave from that date forward. In such a case, no annual leave will be earned for the period in which the employee's annual leave was at the maximum.

All annual leave is paid out only when an employee terminates (whether voluntarily or involuntarily), retires, dies, is transferred to a Church-affiliated entity (e.g. Deseret Book, DMBA, etc.) or, if requested, is placed on long-term disability leave or on Church ecclesiastical leave. Employees going on military leave may choose to save annual leave or may request a payout of such leave (see "Military Leave"). Annual leave is paid at the employee's final rate of pay at the time of the employee's separation.

If a paid holiday falls within an employee's annual leave period, the holiday will not be considered annual leave.

When a nonexempt employee is called back to work during previously scheduled annual leave, the employee has the option to reschedule his or her annual leave in accord with this policy or to be paid for both the annual leave and the callback hours (see "Overtime, Callback Pay, Call-In Pay and Shift Differentials").

Sick Leave

Sick leave is provided by Employer to assist employees in case of illness or accident suffered by the employee or an immediate family member living in the employee's home. Sick leave also may be used in case of illness or accident suffered by the employee's parent. Sick leave is not an entitlement to be used without actual need. Rather, it is part of Employer's short-term disability policy and should be viewed as income protection insurance. Employees are encouraged to use their sick leave wisely and to accumulate sufficient sick leave to provide income protection during the 45-calendar-day waiting period necessary in the event the employee needs to apply for long-term disability. There is no limit to the amount of sick leave an employee may

accrue.

Whenever an employee needs to use sick leave, the provisions of the federal Family Medical Leave Act and its state counterparts may be applicable. These laws provide certain job protection benefits to employees. (See "Family and Medical Leave" section later in this policy for more information.)

Sick leave may be used appropriately in the following circumstances:

1. When an employee is unable to work because of personal illness or injury.
2. When an employee misses work due to pregnancy of the employee or the employee's spouse. (For details on the scope of this leave see "Pregnancy-Related Leave" policy, below.)
3. To cover time away from work for medical, dental and optical examinations, with advance scheduling with supervisors. (When possible, employees should schedule such examinations outside of working hours.)
4. To offset the waiting period under workers' compensation laws between an on-the-job injury and payment of lost-time benefits, but only if the employee returns to regular or transitional work before becoming eligible for lost-time benefits under the workers' compensation laws.
5. To cover time lost from work while caring for other immediate family members (spouse and children) who live in the employee's home. Also to cover time lost from work while caring for sick or injured parents.
6. To make up the difference between LTD benefits and the employee's usual take-home pay (see the "Use with Long-Term Disability" section of "Leave Policy and Absentee Policy").

A fully benefited employee working 40 hours per week accrues 3.08 hours of sick leave for each pay period, up to a maximum of 80 hours per year. A fully benefited employee working less than 40 hours per week accrues a prorated portion of 3.08 hours of sick leave for each pay period worked. No payout of unused sick leave is given to terminating or retiring employees

nor will sick leave balances be transferred to other employers including Church-affiliate entities. Sick leave balances will transfer among Church Operating Entities.

When an illness exceeds three consecutive workdays, employees may be asked to furnish a medical statement from their health care provider detailing the duration of the illness. Following an absence due to illness or accident, an employee may be asked to provide a doctor's release to return to work, certifying that the employee is able to perform the essential functions of the job. Management also may seek a doctor's release if the employee states that he or she can return to work but with limitations. In order to protect the employee's privacy, medical information is kept in a separate medical file and not in the employee's personnel file.

If an employee becomes ill while on annual leave, the employee may, upon medical verification if requested, substitute sick leave for annual leave.

An employee who does not have sufficient accrued sick leave to cover the entire time of a medically related absence will first use sick leave and then annual leave until it is exhausted. If additional time is needed, the employee will be on leave without pay.

Pregnancy-Related Leave

Employees with a pregnancy-related medical condition, or whose spouse has a pregnancy-related medical condition, may take pregnancy-related leave if they are otherwise eligible for such leave under the Family and Medical Leave Act ("FMLA") or applicable state laws. Federal and state laws generally run concurrently and employees are entitled to whichever law provides the employee with greater protection. Likewise, employees who have given birth, whose spouse has given birth, or who have adopted a child may take baby bonding leave if they are otherwise eligible for such leave under the Family and Medical Leave Act or applicable state laws. Managers who receive pregnancy-related leave requests should contact their HR representative to respond to such requests.

If an employee is FMLA eligible, the employee may take up to 12 weeks of FMLA leave per year, including for the employee's own pregnancy-related condition, to care for a spouse with a pregnancy-related medical condition, or for baby bonding. Employees must follow

all requirements for applying for FMLA leave, as set forth in the "Family and Medical Leave Act" policy, below. Employees are entitled to applicable state law leave protections if they are eligible for such protections under applicable state law. If an employee is not eligible for pregnancy-related leave under FMLA or applicable state law, the employee may request up to 6 weeks of unpaid leave for pregnancy-related leave or for baby bonding. All requests that are not protected by FMLA or state law will be considered in light of current staffing needs.

Time off needed for prenatal care doctor visits, severe morning sickness, doctor-ordered bed rest, childbirth, recovery from childbirth or miscarriage and baby bonding would all be covered by a pregnancy-related leave. With the exception of baby bonding, pregnancy-related leave does not need to be taken in one continuous period of time, but may be taken on an as-needed basis. Employees taking time off or leave for pregnancy-related reasons are required to use accrued sick leave first. Once sick leave is exhausted, employees must apply accrued annual leave for the remainder of the leave. If an employee exhausts sick and annual leave but must still remain out on leave that is protected by FMLA or state law, the employee shall take this time as leave without pay.

Generally, Employer will treat an employee's pregnancy-related condition the same as it treats other medical conditions of similarly situated employees.

If an employee is affected by pregnancy or a related medical condition, she may also request a transfer to a less strenuous or hazardous position or to less strenuous or hazardous duties, if this transfer is required by a health care provider certification. The certification should include (1) the date of the medical advisability for the transfer; (2) the probable duration of the period(s) for the advisability of the transfer; (3) a statement that, due to the pregnancy, the employee is unable to perform one or more of the essential functions of her position without undue risk to herself and/or the successful completion of the pregnancy; and (4) a statement that due to her pregnancy, the employee's transfer is medically advisable. All such requests for transfer will be considered in light of current staffing needs.

Employees should provide at least 30 days advance notice of the need for a leave or transfer. If 30 days advance notice is not practicable, notice should be given as soon as possible.

Nursing Mothers Accommodation

An employee may take reasonable breaks to express breast milk for her infant child each time the employee has need to express milk. Employer will designate a private and clean space (not a bathroom) to accommodate expressing and storing of breast milk. In work locations where Employer has not already designated a specific place for the employee to express and temporarily store breast milk, the employee and her manager shall work together to identify an appropriate location.

For non-exempt employees, any break time or breaks taken in excess of normally provided paid breaks will be unpaid breaks. For example, if an employee who normally receives two paid 10-minute breaks and one unpaid 30-minute lunch break during her work day takes 30 minutes during each of her breaks plus her full 30-minute lunch break to express milk, the time in excess of the normal 10-minute paid breaks will be unpaid, as will the lunch break. Non-exempt employees may not extend their scheduled work days to accommodate such breaks.

Leave Share

Employer has established a leave-sharing program whereby employees may donate a portion of their vested annual leave to a fund to assist other employees whose sick and annual leave balances are exhausted due to unanticipated injury or illness. This fund is administered by the Human Resource Department.

Disability Benefits and Leave

To receive long-term disability benefits, an employee must meet eligibility requirements established by Deseret Mutual Benefit Administrators. In most cases, these requirements include being absent from work for 45 consecutive calendar days. Employees may use their accumulated sick leave and then their annual leave to cover this time away from work. If employees do not have sufficient accumulated leave to cover the entire period, they will be placed on Leave of Absence without

Pay (Illness or Accident).

Family and Medical Leave

The federal Family and Medical Leave Act (FMLA), along with counterpart laws enacted by some states, allow eligible employees to have time away from work to take care of certain personal and family medical situations.

1. Basic Leave Entitlement. FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- a. For incapacity due to pregnancy, prenatal medical care, or childbirth.
- b. To care for the employee's child after birth or placement for adoption or foster care.
- c. To care for the employee's spouse, son or daughter, or parent who has a serious health condition.
- d. For a serious health condition that makes the employee unable to perform the employee's job.

2. Military Family Leave Entitlements. Eligible employees whose spouse, son or daughter, or parent is on covered active duty or call to covered active duty status may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered service member during a single 12-month period. A covered service member is (1) a current member of the Armed Forces, including a member of the National Guard or Reserves, is undergoing medical treatment, recuperation, or therapy is otherwise in outpatient status; or is otherwise on the temporary disability retired list for a serious injury or illness*; or (2) a veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the

covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness*.

*The FMLA definitions of “serious injury or illness” for current servicemembers and veterans are distinct from the FMLA definition of “serious health condition”.

3. Benefits and Protections. During FMLA leave, the employer must maintain the employee’s health coverage under any “group health plan” on the same terms as if the employee had continued to work. Upon return from FMLA leave, most employees must be restored to their original or equivalent positions with equivalent pay, benefits and other employment terms.

Use of FMLA leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee’s leave.

4. Eligibility Requirements. Employees are eligible if they have worked for a covered employer for at least 12 months, have 1,250 hours of service in the previous 12 months* and if at least 50 employees are employed by the employer within 75 miles.

*Special hours of service eligibility requirements apply to airline flight crew employees.

5. Definition of Serious Health Condition. A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee’s job or prevents the qualified family member from participating in school or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

6. Use of FMLA Leave. An employee does not need to use this leave entitlement in one block. Leave can be taken intermittently or on a reduced leave schedule

when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the employer’s operations. Leave due to qualifying exigencies may also be taken on an intermittent basis.

7. Substitution of Paid Leave for Unpaid Leave. Employees may choose or employers may require use of accrued paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, employees must comply with the employer’s normal paid leave policies.

8. Employee Responsibilities. Employees must provide 30 days advance notice of the need to take FMLA leave when the need is foreseeable. When 30 days’ notice is not possible, the employee must provide notice as soon as practicable and generally must comply with an employer’s normal call-in procedures.

Employees must provide sufficient information for the employer to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for military family leave. Employees also must inform the employer if the requested leave is for a reason for which FMLA leave was previously taken or certified. Employees also may be required to provide a certification and periodic recertification supporting the need for leave.

9. Employer Responsibilities. Covered employers must inform employees requesting leave whether they are eligible under FMLA. If they are, the notice must specify any additional information required as well as the employees’ rights and responsibilities. If they are not eligible, the employer must provide a reason for the ineligibility.

Covered employers must inform employees if leave will be designated as FMLA-protected and the amount of leave counted against the employee’s leave entitlement. If the employer determines that the leave is not FMLA-protected, the employer must notify the employee.

10. Unlawful Acts by Employers. FMLA makes it

unlawful for any employer to:

- Interfere with, restrain, or deny the exercise of any right provided under FMLA; and
- Discharge or discriminate against any person for opposing any practice made unlawful by FMLA or for involvement in any proceeding under or relating to FMLA.

11. Enforcement. An employee may file a complaint with the U.S. Department of Labor or may bring a private lawsuit against an employer.

FMLA does not affect any federal or state law prohibiting discrimination or supersede any State or local law or collective bargaining agreement which provides greater family or medical leave rights.

While on FMLA leave, employees are required to use available sick leave, if applicable and annual leave before using leave without pay. Sick leave must be used in compliance with Employer's sick leave policy. Insured benefits, such as medical insurance, continue while an employee is on FMLA leave. For any period of time when the employee will be on unpaid leave, the employee is responsible to make arrangements to pay his or her share of the insurance premiums. Employees using FMLA leave may contribute to the Thrift Plan during the time they are on paid leave.

In order to administer FMLA leave fairly and consistently, the following guidelines should be used:

1. For delivery and recovery from childbirth, a female employee may use, without documentation, up to six weeks of her accrued sick leave for a normal delivery and up to eight weeks for a delivery with complications. Upon certification by a health care provider, additional sick leave hours may be used. Any further time (bonding time), up to the maximum available FMLA leave, is first taken as annual leave and then as leave without pay.
2. For assisting his wife in delivery and recovery from childbirth or to assist in caring for a new child with health problems, a male employee may use their accrued sick leave without medical certification for up to six weeks for a normal delivery and up to eight weeks for a delivery with complications. Additional accrued sick leave hours may be used if a health care

provider certifies that the employee's wife or newborn child is in need of further medical care.

3. For adoption or bonding with a well-child, time is taken as annual leave until it is exhausted. For adoption or bonding of a sick child, time is taken as outlined by the FMLA for a sick child. Additional bonding time, up to the maximum available FMLA leave, is taken as leave without pay. Intermittent leave is not available for adoption or bonding with a well-child.
4. When caring for a child or spouse with a serious health condition who lives in the employee's home, or when caring for a parent with a serious health condition, time is taken as sick leave until it is exhausted and then as annual leave until it is exhausted. Additional leave, up to the maximum available FMLA leave, is taken as leave without pay. When the child or spouse is not living in the employee's home, the time is first taken as annual leave and then as leave without pay.
5. Where both husband and wife are employees of Employer and both are eligible for FMLA leave, they are limited to a combined total of 12 weeks of leave during the 12-month period if taken for (a) the birth of the employees' child or related care following birth; (b) receiving an adopted or foster child or caring for the child after he or she is placed with them; or (c) the care of the employees' parents. Any sick leave taken by the wife to recover from the birth of the child is not counted as part of this joint time. Likewise, any sick leave taken by the husband to care for his wife following the birth of their child is not part of this joint time.
6. When a husband and wife both use a portion of the 12 weeks of available leave for one of the purposes stated in paragraph 5 above, the remaining available leave for each spouse is the difference between 12 weeks and the portion of the leave taken under paragraph 5 that is allocated to the spouse.
7. If an employee needs intermittent leave, he or she and the supervisor should work together to schedule the leave so that it serves the employee's need while causing minimal disruption to the workplace. Management may transfer the employee to another position in order to accommodate the employee's

need to take intermittent leave.

8. While on FMLA-Military Leave for a “qualifying exigency,” the time is first taken as annual leave and then as leave without pay.

If the need for the leave is foreseeable, an employee must provide at least 30 days' advance notice before the requested FMLA leave is to begin. If 30 days' notice is not possible, notice must be given as soon as practical. Failure to give proper notice may result in delay of the requested leave or even cause the employee to be ineligible for FMLA leave.

Upon returning from FMLA leave, an employee will be restored to the same position held prior to commencement of the leave unless it was necessary to fill the employee's position. In such case, the employee will be returned to an equivalent position in terms of pay, benefits and conditions of employment.

Employer uses the rolling 12-month look back method in determining available FMLA leave. Each time an employee takes FMLA leave, the remaining leave entitlement is the balance of the 12 weeks which has not been used during the immediately preceding 12 months. FMLA leave is available only for the reasons specified above. An employee may not work for any other employer while on FMLA leave.

Employees who need to use FMLA leave should consult their human resource representative.

Leaves of Absence

Leaves of absence without pay (LWOP) may be approved by the department's managing director or his designee and the human resource director or manager to help employees in various personal circumstances. LWOP may be approved only after the employee has exhausted sick and/or annual leave, in accord with applicable policies. LWOP may be approved in the following situations:

1. *Illness or accident:* When an employee has an illness that lasts longer than the combined total of accumulated sick and annual leave, he or she may be placed on LWOP. The provisions of state and federal family medical leave statutes may be applicable to and will govern such leave requests. If the absence due to illness or accident is expected to last more than

45 days, the employee should make application for long-term disability.

- a. LWOP may last as long as the employee is unable to work because of illness or accident, as verified by a health care professional. If an employee desires to begin leave more than two weeks before scheduled hospitalization, surgery, or estimated delivery of a baby, the request must be accompanied by a doctor's statement regarding the need for early leave. If the leave is to continue more than four weeks after the hospitalization, surgery, other illness, or delivery of a baby (six weeks for baby delivery with complications), the employee must provide a doctor's statement regarding the need for the extended leave. As allowed by applicable statutes, Employer may request recertification by a health care professional of the need for leave.

- b. Within three days of clearance to return to work, employees are expected to advise their supervisor of a return-to-work date. If an employee can return to work without medical restrictions, he or she will be reemployed as soon as possible. To the extent possible, the employee should be returned to the same position or to a position that is comparable in pay, job level and benefits. If the authorization to return to work contains permanent medical restrictions, management will work with the employee to determine whether reasonable accommodations can be made to allow the employee to perform the essential functions of his or her job. Accommodations may include assignment to another job.

- c. At no time should employees be asked or expected to work in excess of reasonable medical advice.

2. *Employee reasons:* An employee may request LWOP for personal reasons unrelated to illness or accident. If such a leave is covered by family medical leave statutes, the provisions of those statutes will be applicable to the request. A request for leave for reasons other than those covered by family medical leave statutes may be approved if the employee is an outstanding performer and it is in Employer's interest to reinstate the employee at the end of the leave.

- a. These leaves must be approved by the department managing director and should not extend beyond one year. At the end of the approved leave, the employee

should return to work or be terminated.

b. An employee may continue participation in the insurance benefits in accord with relevant guidelines issued by Deseret Mutual Benefits Administrators.

3. *Employer reasons:* Under certain circumstances, such as a temporary temple closure, Employer may place essential employees on leave. Employees may choose to use accrued annual leave before being placed on LWOP. During this leave, Employer will continue to pay its share of insurance premiums. Employees must make arrangements to pay their share of insurance premiums so coverage will continue uninterrupted.

The following conditions are applicable to LWOP status:

1. While on LWOP, employees do not accrue sick or annual leave. The time spent on approved LWOP will be counted in determining the rate at which employees accrue annual leave.
2. When an employee returns to active status, unused sick leave will be restored to the employee.
3. Time spent on approved LWOP will count in determining years of service for employees eligible to participate in the Master Retirement Plan.
4. Unless otherwise required under family medical leave statutes or under workers' compensation statutes, employees who desire to continue insurance coverage must make arrangements to pay the insurance premiums. Employer will pay its share of the premium only for the duration of approved leave under family medical leave statutes or while an employee's application for disability benefits is pending (including initial application and any appeal). If long-term disability benefits are approved for an employee, insurance premiums are paid in accord with the provisions of the LTD plan. If long-term disability benefits are not approved, Employer will not pay insurance premiums after expiration of applicable leave periods under state or federal family medical leave laws.
5. If a paid holiday occurs while an employee is on LWOP status, the employee will not be paid for the holiday. (See also "Military Leave.")

The following conditions apply to returning to work from LWOP status:

1. When an employee is ready to return to work following LWOP (including LTD) that extended beyond family medical leave or did not qualify for such leave, the employee will be returned to a position as comparable as reasonably possible in pay, job level and benefits. If such a position is not available in the employee's former department, the Human Resource Department will assist in placing the employee in a suitable position elsewhere in Employer's organization. If no position is immediately available, the former department normally is responsible to employ the individual until an appropriate position becomes available. The Human Resource Department will help coordinate necessary budget details.
2. If the LWOP has been because of illness or accident, before the employee returns to work he or she should provide a medical release or certification from a health care provider indicating that the employee is able to return to work and setting forth any restrictions or limitations.

Other Leaves

1. Church Assignment Leave of Absence (with and without pay)

a. *Area Seventies:* Fully benefited employees serving as Area Seventies are permitted time off with pay to perform responsibilities assigned and scheduled by the Office of the Council of the Twelve or the employee's area leadership. Additional time, beyond that needed for scheduled assignments, such as for side trips or other personal reasons, should be scheduled in advance with the employee's supervisor and taken as annual leave or leave without pay.

b. *Mission and temple presidents:* Fully benefited employees called to serve as mission or temple presidents, or whose spouses are called to serve as mission or temple presidents, will be placed on Church Assignment Leave of Absence without pay (or equivalent country leave without pay) for the duration of their service ("Service"). During the month prior to the commencement of Service, the employees will receive full pay and benefits, but will not be required to

perform work duties except as may reasonably be required for transition purposes. Benefits during the term of Service will be as follows:

1. Sick and Annual Leave. Unused sick and annual leave hours accrued before Service will be reinstated upon return from service. Time spent during Service will be included in the rate of accrual for annual leave if annual leave accrual rate is determined by years of Service.
2. Retirement (Pension) Benefits. In the United States, time spent during Service will be included in years of service for the Master Retirement Plan. Outside the United States, primary employer-funded pension benefits should be preserved. (For example, if the primary pension benefit in a country is a private plan, employer will continue to contribute its portion. If the primary plan is a social plan, employer will otherwise maintain contribution benefit value.)
3. Medical Insurance Benefits. Employees will be provided with a medical reimbursement plan for the duration of Service by the respective Missionary or Temple Department for which they are performing Service. It is intended that employees return to their pre-Service medical plans upon return from Service. If returning to the pre-Service plan is put at risk by absence during Service or preexisting conditions, employees' participation in the plan will be maintained for the duration of Service and funded by the employer.
4. Other Insurance Benefits. The employees' participation in other employer-sponsored insurance plans, such as basic group term life, death and disability insurance, will be maintained and funded by employer during Service. Supplemental life insurance will receive a \$100 maximum per month credit, provided by the respective Missionary or Temple Department for which they are performing Service. Other personal insurance plans or benefits, such as home owners insurance, will be the sole responsibility of the employees.

5. Release and Return to Work. Upon return from

Service to Church employment, employees will be given the same or a reasonably comparable position (provided they continue to meet employment requirements) and the cumulative average merit increase for the years of Service will be added to the salary base.

c. Tabernacle Choir, Orchestra at Temple Square and Temple Square Chorale: Fully benefited employees serving as members of the Tabernacle Choir, Orchestra at Temple Square, or Temple Square Chorale will be permitted time off with pay during normal working hours for scheduled choir, orchestra and chorale assignments. Additional time beyond that needed for scheduled assignments should be taken as annual leave or leave without pay.

d. General board or Church headquarters committee members: Fully benefited employees who are members of Church general boards or Church headquarters committees may receive up to seven days per year of paid leave if required for board or committee assignments, provided the employee does not receive pay for the assignment (e.g., getting paid for being in a Church film) and provided the assignment cannot be completed outside of normal working hours.

e. The portion of the employee's normal workday that is spent on Church assignment leave (except Church Assignment Leave of Absence without pay) will be paid leave and will be considered as time worked for computing overtime.

2. Funeral Leave

a. Fully benefited employees will be allowed necessary time off with pay, up to three days, to attend the funerals of close relatives. The following are deemed "close relatives":

- Spouse
- Child
- Grandchild
- Parent
- Father- or mother-in-law
- Sibling

- Any relative (blood, step, or in-law) who at death was living in the home of the employee.

Funeral leave is a benefit to assist employees in responding to the loss of a loved one. It is not an entitlement.

b. Fully benefited employees will be allowed up to one day off with pay to travel to and attend the funeral of any other relative (blood, step, or in-law).

c. Time taken to attend funerals of those other than relatives should be taken as annual leave or leave of absence without pay (employee reasons) and should be scheduled with the employee's immediate supervisor as far in advance as possible.

d. Funeral leave will be considered as time worked for computing overtime.

3. Jury Duty Leave

a. Employees called to jury duty or subpoenaed as witnesses in court trials will be granted time off to fulfill their responsibility.

b. Fully benefited employees will receive full pay for the time they are absent from work and may retain any money paid by the court.

c. Jury duty leave will be considered time worked for computing overtime.

d. Employees wishing to appear voluntarily in court as a witness must schedule the time in advance with their immediate supervisor. The time should be taken as annual leave or leave of absence without pay.

e. Absence to appear in court as plaintiff or defendant does not qualify for jury duty leave under this policy. Such time must be taken as annual leave or leave of absence without pay.

4. Marriage Leave

a. Employees who have been in benefited employment for at least 12 months who marry and continue employment following their marriage are eligible for two days of marriage leave with pay. Any additional time off should be taken as annual leave or as leave of absence without pay (employee reasons).

b. Marriage leave is not available for employees to

attend the marriages of children or other family members.

c. Time spent on marriage leave will be considered as time worked for computing overtime.

5. Part-Time Public Service Leave

a. An employee is eligible for part-time public service leave if the employee has completed a minimum of one year of employment with Employer and the public office will not negatively affect the employee's work.

b. Campaign activities must not interfere with work assignments. Employees must not campaign for office while at work. Employer's facilities may not be used to obtain lists of names or other information for a political campaign nor may Employer's facilities be used to distribute campaign literature or to promote votes. Employer's supplies, equipment and/or employees may not be used for political activities.

c. If an employee is appointed or elected to a part-time public office, he or she may be granted up to five days a year of leave time with pay, which will be counted as hours worked. Employees may retain any pay received for part-time service. The employee's department management must approve the employee's decision to seek office if the employee is to receive leave with pay. For leave in excess of five days a year, an employee is to use his or her annual leave. In exceptional cases, leave in excess of five days a year may be approved as leave of absence without pay (only after the employee has exhausted his or her annual leave). If an employee requests 30 days or more of public service leave, his or her department management and the managing director of the Human Resource Department must approve the request before the leave begins.

d. Any outside assignments, activities, or committee meetings should be scheduled after regular working hours. If this is not possible, permission must be obtained from the employee's department management before participating in these activities. Time spent counts toward the five days' leave referenced above.

e. Employees will accrue both sick and annual leave while on approved part-time public service leave.

6. Emergency or Weather-Related Leave

a. Occasionally, inclement weather, power failures, or other natural disasters may prevent employees from traveling to work or may result in them being sent home early. The Human Resource Committee must authorize closure of offices in the Salt Lake Valley in such circumstances. The Human Resource Department will apprise other Church departments whenever closure of Salt Lake Valley offices has been authorized. Appropriate local management will decide when inclement weather or other situations necessitate closure of offices outside the Salt Lake Valley.

b. Fully benefited employees will be paid as if they had worked their scheduled shift. The time will be counted as hours worked.

c. Non-benefited employees sent home early from work will be paid for three hours or the hours actually worked, whichever is greater. Non-benefited employees are not paid if they cannot get to work.

d. Department management will evaluate the emergency circumstances of individual employees that result in varying arrival and departure times.

7. Other Leaves

a. The laws of the states where Employer does business may provide for leave in other situations, such as leave for victims of domestic violence to obtain restraining orders and leave for victims of crimes to appear in court. Employer's policy is to comply with both the letter and the spirit of such laws.

b. An employee departing to serve a full-time mission (other than as a mission or temple president) will need to be terminated from employment.

4.2 Military Leave

Employees who apply to the uniformed services to perform active duty or initial active- or inactive-training duty or for any other service in the uniformed services, whether voluntary or called to active duty, other than periodic training assignments (see below) will be placed on military leave of absence with pay (M-LWP) for up to two years of cumulative service over the course of the employee's career in Church employment. If an employee's active duty term exceeds two cumulative years, the employee will be placed on military leave of absence without pay (M-LWOP).

A fully benefited employee who has periodic military training assignments (inactive duty) may be placed on military leave with pay (M-LWP) for up to 15 working days per calendar year. For training assignment leave in excess of 15 days, the employee may choose to take the time as annual leave (if available) or as M-LWOP. A non-benefited employee who has periodic military training assignments will be placed on M-LWOP.

Pay during Leave

Employees going on M-LWOP will be paid through the day prior to the day their M-LWOP begins. If that day is a day before a paid holiday, the employee will be paid for the holiday.

When military leave with pay is approved, the employee will be paid the difference between his or her regular salary and the salary paid by the military unit (base pay plus allowances), provided the pay received from Employer is the greater of the two. The military pay voucher (or certified letter verifying the amount of an employee's military pay) should be taken to Payroll Services in the Finance Department for calculation of leave pay.

Benefits during Leave

1. Employees on military leave with pay (M-LWP):

a. Sick and annual leave: An employee's sick and annual leave balances will be maintained until the employee returns to full-time employment. The employee will not accrue additional sick or annual leave while on M-LWP because their leaves will be provided according to military policies.

b. Medical and dental coverage: If an employee is enrolled in one of Employer's medical and dental insurance plans, the employee and enrolled family members may keep those benefits for up to 24 months or the duration of the employee's active duty assignment (plus the time allowed to apply for reemployment), whichever is shorter. As long as the employee is on M-LWP, Employer will continue to pay its share of the premiums for these plans. For employees on active duty, Employer's coverage becomes secondary to government insurance on the day the employee is activated. For dependents, Employer's coverage continues to be primary and the government insurance is secondary.

c. Life insurance and disability: Supplemental Group Term Life Insurance and 24-Hour AD&D coverage continue while the employee is on M-LWP and will continue until midnight of the last day of the month in which an employee begins M-LWOP. Group Term Life Insurance and Disability may be continued in the same manner as the medical and dental insurance (see above). War exclusion provisions apply to all coverage. Any disability resulting from injury or illness contracted while in military service will not qualify the employee for Employer's disability benefits.

d. Thrift Plan: The employee may contribute to the thrift plan, based on the differential pay being received from Employer (providing there is net pay left after deductions for taxes and insurance benefits). Employer will base its matching amounts on the differential pay. If the employee desires to make thrift plan contributions based on his or her military pay, the employee may do so either as an ongoing contribution or as a makeup contribution (as set forth below in the section on reinstatement). Contributions based on military pay will be subject to the same employer match as if those contributions were made during active employment.

e. Accrual of retirement credit for fully benefited employees on military leave: The time that a fully benefited employee spends on approved military leave of absence with or without pay will be counted to determine the years of service for retirement purposes, including vesting and benefit rate accrual. Time spent performing service in the uniformed services will not be treated as a break in service for retirement purposes.

2. Employees on military leave without pay (M-LWOP)

a. Annual leave: Employees may choose to save unused vested annual leave or may make a written request for a lump-sum payout of their unused vested annual leave. This payment will be included with the employee's final paycheck. If military leave begins before the last day of the pay period, the employee will be paid for the prorated amount of leave earned through the last day he or she worked before going on M-LWOP. Upon returning from M-LWOP, time spent on M-LWOP by a fully benefited employee will be counted in determining the rate at which the employee accrues annual leave.

b. Medical and dental coverage: If an employee is enrolled in one of Employer's medical and dental insurance plans, the employee and enrolled family members may keep those benefits for up to 24 months or the duration of the employee's active duty assignment (plus the time allowed to apply for reemployment), whichever is shorter. During the first three months of M-LWOP, Employer will pay its share of the premiums. The employee must make arrangements through his or her department to pay the employee portion of the premiums. During the next 21 months, if continued coverage is desired, the employee is responsible to pay the entire insurance premium (both the employee's and Employer's portion).

For employees on active duty, Employer's coverage becomes secondary to government insurance on the day the employee is activated. For dependents, Employer's coverage continues to be primary and the government insurance is secondary. As long as premium payments are made, Employer's coverage will continue until midnight on the last day of the last month in which the employee is on active duty or for 24 months, whichever is shorter. If an employee or dependent is in the hospital on the date that benefits terminate, the employee may extend benefits under Employer's medical and dental plan solely for the injury or illness being treated. (In this case, the employee continues to pay the employee's share of the premium and Employer pays its share.) Extended benefits for an employee will end on the date of release from the hospital. Extended benefits for a dependent will end on the date of release from the hospital or 30 days from the date of termination of insurance eligibility, whichever is sooner.

c. Life insurance and disability: Supplemental Group Term Life Insurance and 24-Hour AD&D coverage continue until midnight of the last day of the month in which an employee begins M-LWOP. Group Term Life Insurance and Disability may be continued in the same manner as the medical and dental insurance (see above). War exclusion provisions apply to all coverage. Any disability resulting from injury or illness contracted while in military service will not qualify the employee for Employer's disability benefits. Payment of premiums for Supplemental Group Term Life Insurance and 24-Hour AD&D coverage is the responsibility of the employee.

d. Thrift Plan: An employee on M-LWOP may not contribute to the Thrift Plan. Money on deposit with the plan is subject to withdrawal limitations as described in the Thrift Plan section in the Deseret Mutual Benefit Administrators' Benefits Handbook. (See information on the Thrift Plan in the Reinstatement section below for provisions regarding making up contributions.)

e. Savings Plan loans: An employee on M-LWOP who has a Savings Plan loan may pay off the loan, mail in monthly payments, or delay payments until he or she returns to employment.

f. Accrual of annual leave and sick leave during M-LWOP: A fully benefited employee on military leave of absence without pay will not accrue sick leave or earn annual leave during the leave and will not be paid for holidays. The time spent on approved M-LWOP will be counted to determine the rate at which the employee accrues annual leave.

g. Accrual of retirement credit for fully benefited employees on military leave: The time that a fully benefited employee spends on approved military leave of absence with or without pay will be counted to determine the years of service for retirement purposes, including vesting and benefit rate accrual. Time spent performing service in the uniformed services will not be treated as a break in service for retirement purposes.

Reinstatement

1. For an employee to be eligible for reinstatement following military leave, the following conditions must be satisfied:

a. Advance notice of the need for military leave must be given. The employee or an appropriate officer of the branch of the military in which the employee will be serving must provide advance notice (written or verbal) to the employee's supervisor of the need for military leave, unless notice is impossible, unreasonable, or precluded by military necessity.

b. The total for military leave does not exceed five years. With certain exceptions, the cumulative length of the current absence and all previous absences for military leave from the employee's position with Employer must not exceed five years.

c. The employee must return to work or apply for

reemployment within the appropriate time (see section on time limits below).

d. The employee must have satisfactorily completed his or her military obligation.

2. The following time limits apply for employees returning to work or applying for reemployment following military leave:

a. Absence for fitness examination or military service of less than 31 days: Employees should report to work no later than the first regularly scheduled work period that falls eight hours after the employee returns home.

b. Military service of 31-180 days: Employees should submit an application for reemployment no later than 14 days after the service is completed.

c. Military service of 181 days or more: Employees should submit an application for reemployment no later than 90 days after the service is completed.

d. Hospitalization or convalescence: Employees who are hospitalized for or convalescing from an illness or injury incurred in or aggravated during the performance of military service should, at the end of the necessary recovery period, report for work or submit an application for reemployment according to the preceding time limits. Such period of recovery should not exceed two years.

3. The following time limits and conditions apply concerning the position to which employees will be reinstated after military leave:

a. Military service of 90 days or less: Employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
2. The position of employment held on the date of the commencement of the service in the uniformed services, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by

Employer; or

3. If the employee cannot become qualified for either position described above for reasons other than a disability incurred during or aggravated by service in the uniformed services even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the positions described above (in the order of priority) that the employee is qualified to perform. The employee will receive full seniority.

b. Military service of 91 days or more: Employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed or a position of like seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
2. The position of employment held on the date of the commencement of the service in the uniformed services or a position of like seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
3. If the employee cannot become qualified for either position described above for reasons other than a disability incurred during or aggravated by service in the uniformed services even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the positions described above (in the order of priority) that the employee is qualified to perform. The employee will receive full seniority.

c. *Employees with a disability incurred during or aggravated by military service:* These employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable

efforts by Employer to accommodate the employee's disability; or

2. Any other position that is equivalent in seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified to perform the duties of the position with reasonable efforts by Employer; or
3. If the employee cannot become qualified for either position described above, even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the position referred to in item 2 above in terms of seniority, status and pay.

4. The following conditions apply to the restoration of benefits to fully benefited employees returning from M-LWOP:

a. *Sick leave:* Unused sick leave accumulated prior to M-LWOP will be restored upon the employee's return to active employment. If the employee went on M-LWOP prior to the last day of a pay period, the employee will be given prorated credit for the days he or she worked during the pay period before beginning M-LWOP. The employee will begin accruing sick leave as of the first day back to work.

b. *Annual leave:* The employee will begin accruing annual leave on the first day back to work. Time spent on military leave will be counted in determining the rate of accrual of leave.

c. *Medical and dental coverage:* Employer's medical and dental plans will be effective the first day of the month following the employee's return to work from M-LWOP. Preexisting condition provisions will be waived if the employee:

1. Makes application for reemployment within the time limits for returning to work described above and
2. Enrolls in the plan within 30 days after returning to work.

d. *Life insurance and disability:* The employee becomes eligible for Group Term Life Insurance, Supplemental Group Term Life Insurance, Disability and 24-Hour AD&D coverage upon return to employment with Employer. It is not necessary for the

employee to provide evidence of insurability if he or she:

1. Was enrolled in the plan prior to M-LWOP (under the Disability plan, the employee must be enrolled for two years before preexisting conditions are covered),
2. Makes application for reemployment within the time limits for returning to work described above,
3. Enrolls in the plan within 30 days after returning to work and
4. Enrolls for the same coverage or less than that held prior to M-LWOP.

e. Thrift Plan: Upon return to employment, an employee may immediately enroll in the Thrift Plan. Employees have the opportunity to make up the 401(k) contributions missed while serving on active military duty and receive Employer's match for those make-up contributions.

5. The following conditions apply to the termination of employees who have returned from M-LWOP and were reinstated. No employees reinstated to employment under the terms of this policy should be terminated from their position without cause:

a. Within 180 days after the date of reinstatement if the employee served in the uniformed services for 31 to 180 days, or

b. Within one year after the date of reinstatement if the employee served in the uniformed services for 181 days or more.

4.3 Holidays

Employer provides fully benefited employees with paid time off to observe certain local and national holidays. Non-benefited employees do not receive holiday pay.

The annual holiday schedule for the United States is established and distributed by the Human Resource Department. Observed holidays usually include:

- New Year's Day
- Dr. Martin Luther King Jr. Day
- Presidents Day

- Memorial Day

- Independence Day

- Pioneer Day

- Labor Day

- Thanksgiving (two days)

- Christmas (two days)

Temple employees will observe the same number of holidays as other employees. Because of the operating schedules of the temples, the actual dates may vary by year and by temple. The Temple Department will approve the holiday schedule for each temple. Holidays for countries other than the United States will be established in accordance with local laws and customs.

To be paid for a holiday, employees must work or be on approved paid leave the workday before and the workday following the holiday, unless they are terminating their employment.

Terminating employees whose last day of work is the day before a holiday will be paid for a holiday only if the holiday is the last day of the workweek in which they terminate. Any exceptions must be approved by the employee's manager.

Fully benefited employees whose regular work schedule is fewer than 40 hours per week will accrue a prorated number of holiday hours.

Fully benefited employees who work a compressed schedule, such as four 10-hour days, will receive the same number of holiday hours as do employees working a traditional schedule. Holiday hours for such employees will be reported and tracked in full-day increments based on the employee's usual workday. The holiday schedule for employees on compressed schedules will be set by management, with the employee's agreement, according to the following guidelines:

1. The employee will receive a sufficient number of holidays such that the employee's total number of holiday hours is approximately the same as for employees who work a traditional five 8-hour-days schedule, e.g. 88 hours (11 holidays at 8 hours each).

2. If an observed holiday falls on the employee's regularly scheduled workday, that day will be the employee's holiday unless operational needs mandate that the employee work the observed holiday. See provisions below regarding benefited employees who work on holidays.
3. If the number of observed holidays that fall on the employee's regularly scheduled workdays is less than the number of holidays to which the employee is entitled, department management, with the agreement of the employee, should schedule alternative holidays.
4. If the number of observed holidays that fall on the employee's regularly scheduled workdays is greater than the number of holidays to which the employee is entitled, department management, with the agreement of the employee, should determine which regularly scheduled holidays will not be observed by the employee.

Example: A fully benefited employee is regularly scheduled to work Monday through Thursday for 10 hours each day. He or she would be provided nine holidays, (nine holidays at 10 hours each). Using the 2009 United States holiday schedule, six observed holidays fall on the regularly scheduled workdays (New Year's Day, Martin Luther King Jr. Day, Memorial Day, Labor Day, Thanksgiving Day and Christmas Eve). The employee would receive three additional holidays, which would be "floating holidays," to be scheduled at the mutual convenience of the employee and operational needs.

Holiday hours will be considered as hours worked for computing overtime.

If a fully benefited employee works on a holiday or if the holiday falls on his or her regularly scheduled day off, department management should schedule an alternative holiday (day off) for that employee. This alternative holiday should be within 30 days of the original holiday. With the employee's agreement, in lieu of an alternative holiday, the department may pay holiday pay plus the employee's regular pay. In such a case, both the actual hours worked and the holiday hours will be considered hours worked when computing overtime pay.

5. Employment Actions

5.1 Transfer and Promotions

Employees are selected for promotion or transfer based on Employer's needs, organizational strategy and the employee's performance, qualifications, ability, attitude and interest. Employees are encouraged to develop and increase their ability to perform their present job and to acquire skills that make them candidates for transfer or promotion. Employees may apply for an available job by completing an internal job application available on Employer's Web site. Either management or the employee may initiate discussion of a transfer.

Internal Transfers

An Internal Transfer is defined as the movement of a regular full-time or part-time employee from one position to another, without a break in employment of 30 or more days, whether within the same grade level, the same department, or to another department. Management must consult with HR prior to any Internal Transfer, particularly if it is accompanied by a salary increase.

Employees must have completed a minimum of one year of service in their current position to be considered for an Internal Transfer. Exceptions require the prior written approval of the second-level or higher manager in the current department.

In addition to experience, skills, and qualifications, eligibility for an Internal Transfer ordinarily depends on successful performance in the current position. However, employees struggling in their current position can be considered for a different position for which they may be better qualified. All employees are subject to the standard selection process for any Church position for which they apply.

All position openings should be approved by department or area HR before posting and should be posted online and otherwise as determined by prescribed HR practices. Hiring managers should consult HR with any questions regarding the hiring process.

Promotions

While a promotion is usually initiated by the employee's supervisor, all promotions through grade 99 require the approval of at least two levels of supervision and the department human resource director or manager.

Appointments to managing director positions will be announced by the appropriate General Authority or Executive Council. Department heads are responsible for announcing appointments of employees to director positions within their departments.

Transferring Employees Serving as Ecclesiastical Leaders

See the "Hiring or Transferring Ecclesiastical Leaders" section in "General Conditions of Employment."

Transferring from Other Organizations Covered by DMBA

Employees who transfer to or from affiliated corporations that participate in the employee benefit programs administered by Deseret Mutual Benefit Administrators (DMBA) may, with approval of the department human resource director or manager, transfer benefits according to the following guidelines:

1. The employee's hire date with the previous employer will continue to be the hire date for life insurance benefits, retirement benefits, health insurance benefits, annual leave accrual rate and other benefits as identified.
2. Benefit and vesting credits earned with the previous employer will transfer to the new employer.

Relocation of Employees

Employer will assist certain employees with the usual, customary and reasonable costs associated with relocation necessitated by accepting a new position, transfer, or promotion. The details of relocation assistance, including the specific level of available assistance, are found in the applicable relocation policy. The department for which the employee will work is responsible for determining the actual amount of assistance to be offered to an employee.

Eligibility for relocation assistance is determined by the following guidelines:

1. The distance from the employee's former house to the new workplace must be at least 50 miles greater than the distance from his or her former house to his or her former workplace.
2. The relocation of a current employee must be for the benefit of Employer and not an accommodation for or to the employee.
3. The new employee must be recruited by Employer.

5.2 Corrective Action and Termination

Employees are evaluated on their performance and behavior. Managers and supervisors should treat every employee with dignity and respect, even if corrective action is necessary. Corrective action should be handled in an orderly but direct and honest way, thereby allowing the employee the opportunity, if applicable, to improve unsatisfactory performance or behavior. (See D&C 121:41--44.)

It is not required, but corrective action may follow a progressive path including coaching, verbal warning, written warning, probation, suspension and termination. The level of corrective action to be applied will depend on many factors, including the nature of the offense, past violations by the employee, if any, and length of service. The goal is to allow the employee an early opportunity, if appropriate, to modify performance or behavior so as to avoid more serious disciplinary action. The decision regarding the kind of corrective or disciplinary action to be taken, up to and including termination is in the exclusive judgment of Employer. Employment with Employer remains at will. Nothing in this corrective action policy diminishes the at will policy, which means that either the employee or Employer may terminate the employee's employment, with or without notice and with or without cause.

Coaching and verbal warnings are usually conducted by the employee's immediate supervisor. Supervisors should be direct in their comments without being unkind or degrading. Specific examples of unacceptable performance or behavior should be cited.

As circumstances dictate, management may issue a written warning. Warning letters should be prepared by the supervisor with the assistance of the department's human resource representative. Warning letters should

list specific details of the unsatisfactory work performance and/or unsatisfactory behavior and should identify the desired performance or behavior. The letters should also contain suggestions to the employee on how he or she can make the required changes and how the supervisor will assist the employee.

A warning letter should be delivered to an employee by his or her supervisor and, if possible, the department's human resource representative. The employee should be given a copy of the letter and should be asked to sign the original, indicating that he or she has received and read the letter. The employee's signature does not indicate agreement with the contents of the warning letter.

Probation and Suspension

In cases judged by Employer to involve serious misconduct, serious performance issues, or failure to improve performance or behavior after prior corrective action, an employee may be placed on formal probation. In cases of serious misconduct (not including poor performance), the probation may be accompanied by a defined period of suspension without pay. Disciplinary probation may be imposed for a period of up to 90 days.

Employees should be given written notice of the conditions of the probation, the specified standard of performance or behavior to be attained by the employee and the length of the probationary period. If suspension is being imposed, the length of suspension must be included in the probationary letter. The employee should be asked to sign the original probation letter, indicating that he or she has read and understands the letter and has received a copy. The employee's signature does not indicate agreement with the contents of the letter.

Normally, a probationary period will not extend more than 90 days. In certain positions, especially exempt positions, a longer period may be necessary to establish that a change in performance has occurred. During the probationary period, the supervisor should meet regularly with the employee to discuss progress toward the expected standard of behavior or performance. If progress is not being made, the employee may be terminated at any time during the probationary period.

At the end of the probationary period, the supervisor and a human resource representative should meet with the employee. If the employee has not satisfied the terms of the probation or has not made satisfactory progress toward meeting the terms of the probation, the employee should be terminated. If satisfactory progress has been made but the terms of the probationary period have not been fully met, the probationary period may be extended for a period, usually no more than 45 days. If the terms of the probation have been accomplished, the probation should be ended, with a reminder to the employee that he or she must continue to work or behave at a satisfactory level in order to avoid further corrective action or termination.

Termination

Termination may be imposed when an employee engages in conduct inconsistent with the standards of Employer or if an employee who has received prior corrective action fails to make satisfactory progress toward meeting the expected levels of performance or behavior. Involuntary terminations are approved by the department's human resource director or manager and the department's line manager, division director, or department managing director.

Involuntary terminations, including those on temple worthiness grounds, should be reviewed in advance with the Director, Human Resource Legal Services.

If an employee who serves as an Area Seventy, a member of a stake presidency, or a bishop is being terminated involuntarily, the Human Resource Department should notify the Office of the Quorum of the Twelve, the Office of the Seventy, or the stake president, as appropriate.

Records of Corrective Action

Documentation of corrective action should be placed in an employee's file. From time to time the employee's file should be purged of corrective action documentation if, in the judgment of Employer, such documentation no longer is necessary for administration of the employment relationship.

Behavior Prompting Corrective Action

It is not possible to make a comprehensive list of behavior that may prompt corrective action, including

termination, but examples of such behavior like those listed below may be instructive. An employee may receive corrective action, including termination, if he or she:

1. Does not meet required performance standards.
2. Performs employment-related duties carelessly or inefficiently.
3. Is careless or does not attend to employment-related duties, resulting in a waste of materials or loss of or abuse of tools and equipment.
4. Fails to comply with Employer's standards of conduct, including the requirement to be worthy of a temple recommend.
5. Engages in inappropriate or dishonest workplace behavior, which may include, but is not limited to, the following:
 - a. Destroying, abusing, stealing, or improperly using Employer's property.
 - b. Intentionally falsifying records, including time reports.
 - c. Being negligent in performing duties, resulting in or creating the possibility of injury to persons or damage to Employer's property.
 - d. Engaging in behavior that is detrimental to the work effort, such as excessive absence, refusal to work, insubordination, persistent tardiness, leaving work without authorization before quitting time, failure to perform assigned tasks, unauthorized extension of lunch and break periods, or similar actions deemed inappropriate by Employer.
 - e. Disclosing or failing to secure confidential information.
 - f. Misrepresenting or withholding pertinent facts in securing or retaining employment.
 - g. Making false or misleading statements concerning one's own conduct or making false or misleading allegations of harassment or misconduct by another.
 - h. Misrepresenting or withholding pertinent facts in responding to an internal investigation.

- i. Offering, soliciting, or accepting a bribe or kickback.
- j. Misusing leave benefits.
- k. Disrupting the work of other employees, including harassment or sexual harassment.
- l. Violating the conflict of interest policy.
- m. Making malicious, false, or derogatory statements or engaging in any other conduct that may damage the integrity or reputation of Employer, its employees, or The Church of Jesus Christ of Latter-day Saints.
- n. Loafing, loitering, or sleeping during work hours.
- o. Failing to immediately report any on-the-job injury or accident involving Employer's equipment, property, or employees.
- p. Failing to observe safety and security regulations and instructions.
- q. Bringing a firearm or other weapon to the workplace or onto Employer's property or engaging in threatening or violent behavior.

r. Violating the No Harassment or Discrimination policy or No Retaliation policy.

5.3. Employee Appeal Process

Employees should feel comfortable discussing work-related concerns with their immediate and next-level supervisors. Each employee has the opportunity for a prompt, impartial review of work-related concerns through proper management channels. Work-related concerns should be resolved at the lowest possible level in the organization, usually with the employee's immediate supervisor. Employees should not seek General Authority involvement.

Review of Significant Adverse Employment Actions

Decisions involving significant adverse employment actions (i.e., involuntary termination, suspension, formal work-related probation, or involuntary demotion or transfer to a lower grade) may be appealed. Absent extraordinary circumstances, the employee should initiate a written appeal within fourteen (14) calendar days of being notified of the adverse employment action.

The appeal should be directed to the highest non-General Authority level of management in the employee's department (usually the managing director, the director of temporal affairs, or equivalent). The employee initiates an appeal by submitting a written statement of the specific reasons he or she believes the decision reached by management is not correct or proper. Relevant documents should be attached to the written statement. After considering the employee's statement, the department head may meet with the employee and/or the employee's supervisors. The department's human resource representative or a member of the Human Resource Department may be present during any discussions with the employee. The department head should give the employee a written decision on the appeal.

Within seven (7) days of receipt of the written decision, the employee may request that the managing director of the Human Resource Department review an unfavorable response to his or her appeal. Unless new facts have come to light, the written appeal statement submitted to the department head will be the basis for the review. The Human Resource managing director may consult with his directors, the employee and the employee's supervisor, manager and managing director. The Human Resource managing director should give the employee a written response to the request for review. The Director, HR Legal Services acts as legal adviser at all stages of the appeal and review process. Employees should not seek General Authority involvement in appealing adverse employment actions.

Other Work-Related Concerns

Resolving work-related concerns other than significant adverse employment actions begins with the employee's immediate supervisor. The department's human resource representative is available to assist if the supervisor or employee so desires. Employees who believe that their supervisor is part of the concern may go directly to the next-level supervisor. If the concern is not resolved by discussions with the immediate or next-level supervisor, the employee may request a review of the concern by the department's director who has responsibility for the employee. (If the director is the first- or second-level supervisor and has been involved in prior resolution efforts, the employee may request that the managing director review the concern.) The

department's human resource representative is available to assist if the employee requests such involvement. The decision of the director or managing director shall be final. Employees should not seek General Authority involvement in appealing work-related concerns.

This policy does not replace or supersede the complaint process set forth in the No Discrimination or Harassment policy. (See Our Standards of Conduct.) As set forth in more detail in that policy, employees may direct their complaints of harassment, discrimination, or retaliation to their immediate supervisor, their next-level managers, their human resource representative, or the Human Resource Department.

5.4. Letters of Recommendation

Requests for letters of recommendation must be directed to the human resource director or manager of the department where the requesting employee or former employee last worked. The request should identify the position last held by the requestor and his or her last supervisor. The department's human resource representative will assist the employee's last supervisor in preparing the letter of recommendation. The Director, HR Legal Services should be consulted with any questions.

Individual employees responding to a personal acquaintance's request for a letter of recommendation must not use Employer's letterhead or express or imply Employer's endorsement for the recommendation.

5.5. Reductions in Force

As the Church grows, Employer is faced with the increasing emphasis on obtaining efficiencies in the manner in which work is performed within Employer's organizations. These efforts may result in reductions in force (RIF) for certain departments or divisions. Before any RIF, managers should contact the Human Resource Department to obtain current guidelines and appropriate approvals.

5.6. Retirement

When an employee indicates a desire to retire, the department should notify the Benefits Office of the Human Resource Department as early as possible, preferably at least four months before the desired retirement date.

An employee's retirement benefits are governed by the terms of the Deseret Mutual Master Retirement Plan. An employee's insured benefits will be effective through the last day of the month in which the employee works. Noninsured benefits typically end on the last day worked. Unused, vested annual leave will be paid out upon retirement. Unused sick leave will not be paid out.

Departments may hold a reception for a retiring employee according to the following guidelines:

1. An employee retiring with 10 through 19 years of service may be given a reception hosted by and including the employee's division, with selected others within the employee's department also invited. The employee may also be given a letter of appreciation from the department or division head or from a member of field management.
2. An employee retiring with 20 through 34 years of service may be given a reception hosted by and including the employee's department, with selected others in other departments also invited. The employee may also be given a letter of appreciation from the First Presidency.
3. An employee retiring with 35 or more years of service may be given a reception hosted by the employee's department or organization, with selected others in other departments also invited. The employee may also be given a letter of appreciation from the First Presidency. At Church headquarters, the letter will be presented by the General Authority adviser of the department. In locations away from Church headquarters, the employee's immediate supervisor or other department management may present the letter.
4. Retiring managing directors and other designated employees may be honored in the same manner as those retiring with 35 or more years of service.
5. Employer will pay reception costs through the employee's department or area operating budget.

5.7 Payment for Courses, Seminars, Licenses and Certificates

Employer encourages and promotes self-improvement by its employees. Employees may be required to take certain courses or possess appropriate

licenses and certificates if necessary for their job. Employer will pay the costs associated with such courses, licenses and certificates in the circumstances set forth below.

Courses and Seminars

Employer will reimburse or prepay 100 percent of the authorized costs of a course, seminar, or convention that it requires an employee to attend. Authorized costs include appropriate travel, tuition, books and related fees. Employees should not be required or authorized to attend an outside course if a course that is substantially similar in content is offered in-house. Employer will not pay for a course or seminar if the employee receives financial aid for the course from any other source, such as veterans' benefits, scholarships and grants. If an employee receives partial payment for a course from another source, Employer will pay the difference between what the employee receives from the other source and the cost of the course. When an employee is required to take a college course, advance approval must be obtained from the employee's managing director.

Licenses and Certificates

Employer will reimburse or prepay 100 percent of the cost of obtaining or retaining a license or certificate required for the employee's job.

Educational Reimbursement

To assist employees in self-improvement, Employer has established a policy, subject to department budget constraints, of reimbursing fully benefited employees for up to 75 percent of tuition, books, equipment required for the course and customary and usual fees for educational courses the employee takes. Employees may be reimbursed for the costs associated with up to two courses per quarter or semester, not to exceed eight credit hours. The total reimbursement may not exceed the calendar year limits set out in the Internal Revenue Code. In addition to budgetary considerations, reimbursement is based upon the following factors:

1. The employee must:
 - a. Be a fully benefited employee who has been employed more than six months.

b. Be on the payroll at the beginning and at the end of the course.

2. The course must accomplish at least one of the following:

a. Help develop skills that will improve the employee's performance in his or her current position.

b. Help the employee qualify for other employment with Employer that realistically may become available.

c. Help the employee maintain a license or certification that enhances the employee's work value to Employer.

d. Lead to a college undergraduate or master's degree. Employees will not be reimbursed for courses necessary to meet the minimum requirements for their current position.

3. The employee must receive a grade of C or better for graded courses or a pass or completed designation for non-graded courses.

4. Courses must be taken from an accredited institution of higher education, as accredited by a regional agency of the Commission on Institutions of Higher Education.

5. Approval must be given for the course before the first day of class.

6. Employer will not reimburse an employee or pay for a course if the employee receives financial aid for the same course from any other source, such as veterans' benefits, scholarships and grants. (A repayable loan is not considered financial aid from another source.) If the employee receives partial financial aid from another source, Employer will pay the difference, up to 75 percent of the cost for tuition, books and applicable fees.

7. Courses should not be taken during the employee's normal workday. The employee's managing director may approve exceptions if there will be no adverse effect on the employee's work and if the employee arranges to make up time lost from work due to attending the class.

Educational reimbursements for some classes may be taxable. The employee is responsible for paying any such tax. Where the reimbursement for a class is taxable,

the amount of the reimbursement will be added to the employee's annual tax report form.

6. Compliance and Privacy

6.1.Compliance with the Laws of the Local Jurisdiction

Employer is committed to conducting its business operations in compliance with the laws of the various jurisdictions where its operations are located. To the extent that any policy set out herein is in conflict with applicable local, state, federal, or national law, the policy will be superseded by the law.

6.2.Protection of Employee Privacy

Personnel Files

To the extent possible and practical, Employer seeks to ensure the privacy of the personnel records of each employee. The Human Resource Department is responsible for establishing and evaluating the human resource record-keeping practices of all departments.

Generally, an employee's personnel file should contain the application for employment and any Personnel Action Forms (PAF), Employee Action Forms (EAF), Disclosure of Possible Conflict of Interest forms, Assignment of Work Products Agreement forms, performance appraisals, commendation letters and notices and disciplinary notes and letters. Medical information, such as that submitted in support of a request for family or medical leave, must be kept in a separate file.

Employees have access to the above-described personnel file upon reasonable request and at reasonable times. Employees may respond in writing to any information contained in their files. These written responses will be included in the files.

Supervisors have access to all information in their employees' files, except for the medical information. Medical information may be accessed only upon establishment of an appropriate employment-related need.

Supervisors do not have access to the personnel files of employees outside their line of responsibility, except to obtain information on an employee who may be

transferred into their line of responsibility. Employees in the Human Resource Department and department employees with human resource responsibilities may have access to the personnel files of all employees within the scope of their assignment.

To the extent appropriate, Employer will comply with any government investigation and will comply with both the spirit and letter of applicable laws regarding release of employee information to government investigators. Under government statute or regulations, access to an employee's personnel files will be granted to government agencies upon proper request. Employer will provide access to employee files in response to a proper subpoena. You should contact OGC promptly upon receiving a request from a government agency or official that either (a) is for Church Proprietary Information or (b) is not routine in nature. Any information provided to a governmental agency or official should be completely honest and truthful. Be sure that records relevant to the government inquiry are preserved.

7. Church-Service Missionaries

The vision of the Church-Service Missionary (CSM) Program is to:

- Enable members to use their talents in meaningful service to sustain the continued growth and progress of Church operations worldwide and
- Ensure spiritual and productive mission experiences that bless those who serve and help souls come closer to Christ.

As the Church continues to grow, the operational needs for resources continue to increase as well. “Senior” members of the Church have many years of valuable professional and ecclesiastical experience combined with great faith and testimony. When matched to the right assignments, they bring extraordinary levels of expertise and commitment to the work. Young adults who have been “honorably excused” from full-time proselyting missions can also make great contributions. The proper use of the CSM program can also help reduce the need for increasing the number of employees, thereby saving some human resource costs. The CSM program is not intended to diminish the emphasis on full-time missionary

opportunities or service in temples, ward or stake callings, etc.

Callings That Are Not Processed as Church-Service Missions

“Callings to assist with activation efforts or to help strengthen members in wards are made by local [priesthood] leaders. These callings are not processed as Church-service mission calls. This guideline applies even if members will serve outside their home wards.” *Handbook 1, Stake Presidents and Bishops, 2010, Section 4.12.10, p. 39*

Volunteer Service

“Many opportunities for Church service are available for members, including those who do not hold a current temple recommend and for nonmembers. These individuals are volunteers rather than missionaries. Volunteers may serve in areas such as family history centers, FamilySearch indexing, welfare production projects and canneries and Scouting if qualified for Scout registration.” *Handbook 1, Stake Presidents and Bishops, 2010, Section 4.13, p. 39*

As operations managers contemplate using Church-service missionaries, they should carefully consider the following:

- Work assignments must be meaningful and needed. Do not use CSMs instead of designing your work processes for efficiency and results, or giving missionaries the work that no one else wants to do. Although missionary service is considered to be “free,” it costs the missionaries to serve as they pay for commuting, food, clothes and other expenses.
- Appropriately matching potential missionaries to the right work is the best way to ensure a positive and productive mission experience for both the missionary and the operation. The hiring manager and the potential missionary should invest the necessary time, effort and prayer to match his/her skills, abilities, interests and availability to the right assignment. Make sure the potential missionaries understand what the day-to-day work involves before arrangements are completed.
- While many things are similar, there are some differences between paid and non-paid resources so

managers and supervisors must learn to effectively manage this “mixed workforce” that works together for common causes.

- Just as with employees, missionaries should clearly understand the needs and expectations of their assignment and receive the same orientation, training, tools and facilities needed for a successful and fulfilling experience. Aside from the obvious job training, this includes codes of conduct, safety, systems and building access, comfortable work environment, materials, emergency preparedness, who provides them with direction and support, etc. Each operation for whom the CSMs work is responsible to acquire their missionary badges.

Minimum Requirements for Church-Service Missionary Calls

1. The assignment should report to a Church department and require an average of no less than eight hours per week for usually 6-24 months. Young CSMs (those “honorably excused” from full-time proselyting missions) are encouraged to serve as close to full-time as possible.
2. Missionaries must be temple worthy (do not have to be endowed unless the assignment requires it).
3. Missionaries must be physically, mentally and emotionally able to perform the specified duties.
4. Missionaries should be capable of supporting themselves financially, which includes normal commuting and any medical, dental or insurance needs. If a vehicle is necessary to do the assigned work, one may be made available by the sponsoring department or the missionary may be reimbursed for use of his or her personal vehicle. Other required travel expenses, including airfare, should also be covered by the department.
5. Missionaries should be the same minimum age as required for full-time proselyting missions (18 for men, 19 for women).
6. Couples serving together and individuals with young children at home should not be called.

Ecclesiastical Leadership

In most cases, the stake president and bishop of the stake and ward in which the missionaries reside are the ecclesiastical leaders. Their membership records remain in that ward, they pay their tithes and other offerings there and their temple recommends are renewed by those leaders. Church-service missionaries are encouraged to serve in ward, stake, temple or other callings at the discretion of local leaders if they do not interfere with their CSM assignment.

Obtaining Church-Service Missionaries

There are several channels through which CSMs may be obtained:

- In North America, the Presidency of the Seventy instituted the annual “Coordination Process” which is administered by the central CSM office. CSM and volunteer needs for the following year are gathered from Church operations by the local CSM Coordinators who then assign them to the appropriate stakes. Individual, direct requests from operations to local priesthood leaders outside of the Coordination Process are discouraged. Contact the local CSM Coordinators or the central CSM office for more information.
- Church operations in North America should post their open positions on the CSM opportunities website on lds.org. Lists of opportunities for specific geographic areas can be printed from this website for posting on meetinghouse bulletin boards, etc. International areas may have individual “country sites” that may have a missionary opportunities section. The contact information of the hiring manager is included on each posting so that interested members may inquire for more details.
- Networking through current and former CSMs, family, friends and ward/stake members can also be effective.
- A significant number of Church members proactively seek out available service opportunities, through CSM opportunity websites, family and friends, local priesthood leaders, etc.
- Other LDS organizations and websites can sometimes be a resource as well.

Recommendation and Interview Process

The bishop (also includes branch presidents), the interested member(s) and the operations manager must all be in agreement that the member's skills, interests and availability match well with the CSM need. The member then fills out the Recommendation for Church-Service Missionary form. Please make sure the form is filled out accurately and completely. The bishop signs it verifying his endorsement and the member's worthiness of a temple recommend. The stake president (also includes district presidents) must also approve of the call, reaffirms temple worthiness and signs the form. The form is then sent to the local CSM Coordinators or the CSM office at Church headquarters as appropriate. In international areas, the Area HR Office typically processes the calls and releases.

Mission Calls

Once the recommendation form has been processed, a mission call letter is sent to the stake president, who formally issues the call and instructs the bishop to set the missionaries apart. If for some reason, the call is not accepted, the stake president should notify the bishop and Church operation. Church-service missionaries are not trained at a Missionary Training Center.

Mission Extensions

Near the end of the mission, a decision may be made to extend the call for varying lengths of time if (a) the work assignment is still needed, (b) the missionary's stake president approves and (c) the missionary wants to continue serving in the same assignment.

If all three of the above are true, whoever processed the original mission call can extend the release date in their missionary database. It is essential that this is done at least one month prior to the original release date so that a release letter is not sent by mistake.

Mission Releases

When a CSM is released, a certificate of thanks is sent to the stake president, which he presents to the missionary. He should then notify the bishop and suggest that the missionary be given opportunities to speak about his/her mission experience in the appropriate meetings.

Additional Information

A Church-Service Missionary web portal can be found on the Church's intranet which contains much more detail about the CSM program policies, processes, multimedia resources, forms, articles, computer applications, training materials, etc. Additional questions can also be addressed by the local CSM Coordinators, Area HR staff or the CSM Office at Church headquarters.

Church-Service Missionary Coordinators

The Church-Service Missionary organization consists of a central program office in the HR department at Church headquarters, CSM Coordinators located throughout North America and Area HR Managers, staff and coordinators in international areas. Coordinators in the field provide training and support to local operations managers, priesthood leaders, missionaries and members.

As needed, Church departments may have an individual or couple to coordinate Church-service missionary (and volunteer) efforts for their department. These coordinators may be Church-service missionaries themselves and would work with the appropriate CSM program coordinators and HR staff.

The central program office provides training, content, tools and support and can be reached at 801-240-4914 and csm-support@ldschurch.org. Operations and local priesthood leaders in international areas should contact their Area Human Resource Manager for assistance.

8. Vehicle-Use Policy

Employer provides fleet vehicles for use by its employees under specific circumstances so that they may more effectively carry out their assigned tasks. All vehicles are to be operated in a safe and law-abiding manner by a driver with a valid driver's license for the area where the vehicle is to be driven.

Assigned Vehicles

Assignment of a vehicle are approved in writing by the employee's headquarters functional department head. Fleet vehicles may be assigned if any of the following conditions are met:

1. *Mileage-justified*: A vehicle may be assigned to an employee when his or her normal job duties require

sufficient travel to justify the cost of Employer buying a vehicle rather than using the motor pool, renting a vehicle, or reimbursing an employee for using a personal vehicle.

2. *Position-justified:* A vehicle may be assigned to an employee when normal job requirements cannot be accomplished by using a motor pool vehicle due to special equipment requirements or significant geographical separation from the motor pool location.

3. *Benefit-justified:* A vehicle may be assigned to an employee as a benefit based on common practice as part of his or her compensation. A benefit-justified vehicle must be approved by the benefits committee.

4. *Expatriate:* A vehicle may be assigned to an expatriate employee.

Motor Pool Vehicle Use

1. Motor pool vehicles should be used as the primary vehicles for business needs when public transportation is not available, unless the business miles driven by an individual are in excess of the annual amount needed to justify an assigned vehicle.

2. Employee use of a motor pool vehicle for official business requires authorization from an approved supervisor or manager and a reservation with the motor pool office.

3. Motor pool and department pool vehicles are not to be used for any personal purposes.

4. Employees and Church-service missionaries provide their own transportation to and from their places of assignment. Once there, if a vehicle is needed to do the assigned work, a motor pool vehicle may be made available upon proper authorization.

5. The driver of a motor pool vehicle is responsible for returning the vehicle full of fuel and clean inside and out and for reporting any damage or problems to the motor pool coordinator.

Non-business Use of Assigned Vehicles

1. Mileage- and position-justified vehicles may *not* be used for personal use. The assigned driver is the only authorized driver.

2. Benefit-justified and expatriate vehicles may be used for personal use and may be driven by all immediate family members who have a driver's license that is valid in the area where the vehicle is being driven.

Safe Driving Practices

The primary responsibility for safely operating any vehicle lies with the individual driver. It is required that all employees, volunteers and missionaries obey all traffic laws, signs and signals and adhere to the following safety guidelines while driving.

1. The driver and all passengers wear shoulder and lap safety belts when the vehicle is in operation.

2. The driver has a current and valid driver's license.

3. The driver respects and follows all applicable laws.

4. The driver does not use any handheld device, such as a cell phone, personal digital assistant (PDA), or laptop computer. If allowed by law, cell phones operated with hands-free equipment may be used.

5. The driver refrains from all distracting practices, including:

a. Eating and drinking,

b. Reading and writing and

c. Grooming.

6. All needed repairs to Church vehicles are made in a timely manner in order to prevent incidents or additional damage.

7. Accidents should be reported to Church Fleet Administration and the driver's supervisor within 24 hours.

8. Traffic and parking tickets are taken care of by the driver immediately.

9. The preventive maintenance schedule is followed for both time and mileage.

Additional details may be obtained by calling Church Fleet Administration at Church headquarters.

Vehicle Expenses

Employer will pay for the purchase, licensing, title, insurance, maintenance, repair and servicing of all fleet vehicles. Tickets, fines and tows are the responsibility of the individual driver. Fuel costs are handled as follows:

1. *Motor pool vehicles*: All fuel is covered with a fuel card.

2. *Mileage- and position-justified vehicles*: The employee will be reimbursed for fuel purchases.

3. *Benefit-justified and expatriate vehicles*: The employee will purchase all fuel. If the vehicle was used for business purposes, the employee applies for a reimbursement from Employer at the approved gasoline-reimbursement rate.

4. *Commuting-only vehicles*: Employer will purchase the fuel.

Fleet Vehicles Authorized for Commuting Only

A fleet vehicle may be authorized to be taken home by an employee only in unusual circumstances, where there is a danger of vandalism to the vehicle if it is stored overnight on business premises or there are no facilities for safe storage on or immediately near the premises. Proper authorization of senior management must be received before the vehicle is justified to be used for commuting. No personal use is allowed in this situation and the employee must record and report the number of commutes taken annually. The value of these commutes will be added as part of the employee's income.

Income Tax Reporting of Personal Use of Fleet Vehicles

Each driver needs to report all personal use of fleet vehicles to payroll services. Payroll services and the tax division will determine how to handle the appropriate tax requirements. This includes drivers of benefit-justified and expatriate vehicles. Drivers using commuting-only vehicles need to report the number of commutes to payroll services. It will be reflected on the employee's W-2 form.

9. Travel Policy

This policy is the global minimum travel policy. Area offices and departments may implement policies that are

stricter than this policy for employees and workforce only. Workforce includes all employees, volunteers and Church service missionaries. Travel policies for full-time missionaries are managed by the Missionary Department. General Authorities travel policies are managed by the Office of the Presiding Bishopric. This policy does not replace any existing travel policies that pertain to General Authorities, missionaries or mission president travel. Information regarding expatriate travel is addressed in the Human Resources expatriate policy.

General

When Male and Female Employees Travel to the Same Event

Work responsibilities occasionally require female and male employees or volunteers to travel to the same event. While separate transportation may be requested by employees in order to avoid the appearance of impropriety, individual Church departments and employees should not develop travel policies or practices that discriminate against employees based on gender. This includes practices that would curtail work, promotion, or travel opportunities. Travel practices should not be applied in a way that would limit the ability of employees to accomplish their job responsibilities, to attend business meetings or conferences, or to pursue development opportunities. Employees should nonetheless use wisdom and prudence while traveling to avoid inappropriate conduct and the appearance of impropriety.

Church-Issued Corporate Credit Card

Church issued credit cards are available at no cost for all travelers on the Church's business according to the following guidelines:

- Travelers who expect to incur travel expenses use a Church-designated corporate credit card whenever possible;
- Church-designated corporate credit cards are to be used only for business travel expenditures. Personal use of Church-designated corporate credit cards, including cash withdrawal, is not allowed;
- Travelers are responsible for timely payment of all charges to the issuing bank;

- Delinquent cards are subject to cancellation by the Church or the card issuer;
- The cardholder is responsible for delinquent fees and should not submit these charges for reimbursement;
- Cancellation of the Church-designated corporate credit card could impede a traveler's ability to perform essential work tasks and might result in work-related discipline or assignment changes; and
- Cards are returned to the Church when the traveler's duties are terminated or when the designated Church travel office so directs.

Key Employee Group Travel

When making travel plans, travelers should consider the impact on the Church if an accident were to occur. Therefore, whenever a group of key personnel (such as managing directors and key department or division personnel who perform unique or essential functions) are required to travel to the same destination, it is recommended that they do not all travel together in the same aircraft or vehicle.

Non-Church Employees

Non-Church employees, such as contractors and job candidates who travel at Church expense, are expected to abide by the policy guidelines set forth in this document. Travel arrangements (air, lodging, ground transportation, passport and visa needs) should be made through the Church Travel Office by a department travel coordinator using the self-booking tool or by calling a Church travel counselor at 1-800-537-1232 (ext. 2-3334).

Travel Approval

Advance approval for travel is obtained from the traveler's supervisor or manager. The same supervisor or manager and the department controller should approve the traveler's expense reports.

- Supervisors should approve travel requests only when the trip is necessary to conduct the business or meet the training needs of the traveler.
- Before approving travel, the supervisor should be sure there is money available in the designated budget to cover the cost of the trip.

- Supervisors should generally not approve a trip until the traveler's previous expense reports have been completed and submitted.

Traveler Profiles

Travelers should create and maintain a complete traveler profile in the Church-sponsored self-booking tool (where available) or with a Church Travel Agent to ensure that key individual data and preferences are used during the reservation process.

- The name used in the traveler profile is to match the name on the traveler's passport or national ID.

Travel Reservations

All air, lodging and car rental reservations are reserved through the Church-sponsored self-booking tool or the designated Church travel office. These are charged to the corporate travel card. The designated Church travel office is responsible for:

- Reserving air, hotel and ground transportation.
- Helping to locate travelers in case of emergency.
- Applying Church-negotiated discounts to the services used.
- Providing consolidated reports for travel management.
- Monitoring and enhancing preferred supplier programs.
- Managing travel agency performance and relationships in areas where the bookings are outsourced.

Please note: The Church requires pre-trip authorization for all Church-related business travel.

- All airfare must be charged to the Church's corporate travel account or a Church-designated corporate credit card.
- Non-airfare travel related expenses, including hotel, car and meals, are charged to the traveler's individual Church travel card.
- Travelers may use personal upgrades to improve class of service (such as airline, hotel room and car rental

class upgrades), provided there is no additional cost to the Church. Travelers must request and manage any upgrades on their own.

Vendor Travel

Travelers do not travel at the expense of any vendor, travel in the private aircraft of any vendor, or accept or use travel arrangements completed by any vendor.

This does not include training trips specifically covered in the price of purchased or contracted equipment.

Air Transportation

Travelers must book air transportation through the Church-sponsored self-booking tool or the designated Church travel office.

Travelers should travel on contracted carriers unless service is not available to a particular destination, the service offered presents an unreasonable routing between origin and destination, or an alternate non-travel option is available.

Advance Purchase and Ticket Restrictions

Airfare should be purchased at least 14–21 days in advance because the differences in fare can be substantial. Make sure to account for approval time when booking your flight.

- Restricted tickets – such as nonrefundable, advance purchase and discount tickets – are generally less expensive and should be used whenever possible.

Airline Class of Service

All air travel is restricted to coach fares. Business class is allowed in the following circumstances:

- A traveler is flying within Africa (for safety purposes).
- A traveler is accompanying a General Authority that is traveling in business class.

Bumped Tickets

If a traveler is given an airline voucher as compensation for being bumped from his or her scheduled flight, that traveler may use the voucher for

personal travel.

Electronic Tickets

Electronic tickets will be issued whenever possible. These tickets eliminate the need to file lost ticket applications, pay higher fares for replacement tickets, or pay fees for prepaid tickets.

- It is advisable to have the most current itinerary on hand in order to avoid confusion over multiple bookings or changes to other itineraries. Some airports may also require an itinerary and a government-issued photo ID to use curbside check-in services or to pass security checkpoints in the airport.
- If travel plans change, notify the designated Church travel office immediately, before flight time. All the rules of ticket cancellation and exchange still apply.
- To refund any unused ticket, either whole or partial, please contact the designated Church travel office immediately.

Frequent Flyer Program

Use of frequent flyer or reward program benefits should not influence the traveler's decisions when arranging travel for Church business.

- Travelers may retain all frequent flyer or reward program benefits derived from traveling on behalf of the Church.
- Membership fees associated with joining these programs are not reimbursable.

Lost Baggage

The airline is ultimately responsible for retrieving and compensating for lost baggage. The Church-designated corporate credit card provides \$1,250 secondary limited baggage insurance.

- The traveler should first attempt to get compensation from the airline.
- If additional reimbursement is required to cover the value of the lost items, the traveler may obtain a lost luggage form from the designated Church travel office and submit it to the corporate card company.

Lowest Logical Airfare

Travelers are encouraged to purchase airfare at or near the lowest logical airfare. The following criteria will be used by the designated Church travel office to determine the lowest logical airfare:

- Church-negotiated fares
- Nonrefundable fares
- Restricted discounted fares
- Penalty fares
- Advance purchase fares
- Connecting and one-stop flights
- Off-peak flights
- Alternate airports
- Promotional or bulk fares
- Lower-cost non-preferred carriers

Payment of Airfare

Travelers must charge all airfare to the Church's corporate travel account or a Church-designated corporate credit card.

Ticket or Itinerary Changes and Fees

To avoid costly airline fees (\$150 and higher), travelers are encouraged to avoid changing their travel itinerary after a ticket has been issued.

Travelers are expected to plan their trips wisely to avoid and minimize itinerary changes.

Travel on Private Aircraft

The managing director of a department may authorize a traveler to use air transportation other than scheduled airlines or charter flights. These companies should possess certification from the Department of Transportation or a comparable governmental agency.

- Written approval is obtained from managing director prior to departure.
- The written approval should be limited to specific flights for specific travelers or be limited to a specified type or purpose of transportation for an identified group of travelers.

Such flights should be necessary to successfully conduct official business and should not be solely for traveler convenience. Only authorized travelers are to accompany the traveler.

Unused Tickets, Cancellations and Refunds

Unused airline tickets have significant value and should be treated as cash. Unused tickets are reported to the designated Church travel office as follows:

- For unused electronic tickets, contact the designated Church travel office immediately, before the scheduled flight departure time, to ensure credits or refunds are issued.
- For unused paper tickets, return the tickets to the designated Church travel office as soon as it is determined that the tickets will not be used.
- Returning unused paper tickets to the designated Church travel office does not automatically cancel travel reservations. Travelers call the designated Church travel office before the flight's scheduled departure time to cancel their reservations; otherwise the ticket becomes invalid.

Upgrades

Travelers may upgrade their class of travel only when there is no additional cost to the Church. Travelers must request and manage any upgrades themselves.

Ground Transportation

Church travelers must book car rentals through the Church-sponsored self-booking tool or a Church corporate travel agent. The Church has negotiated preferred supplier programs to meet its car rental requirements. Travelers must use the preferred companies unless their services are not available, a vehicle is not available, or locally negotiated arrangements are more beneficial.

Church travelers must be licensed and 21 years of age or older to rent a car.

Note: Driving in countries outside the traveler's country of origin may require an international driver's license.

Church Motor Pool

For local or regional business travel, a vehicle from the motor pool may be a suitable alternative to flying, renting a vehicle, or driving a personal vehicle. Please refer to the vehicle use policy.

Class of Service

Midsize cars are the standard for all Church travelers. Specialty vehicles can be used when needed.

The type of rented car should reflect the appropriate image of the Church.

Inspection and Refueling

When you select a vehicle, inspect it for any damages before leaving the car rental lot.

Return rental cars with a full tank of fuel to avoid refueling surcharges imposed by the rental companies. Fuel receipts should be submitted with the expense report.

Insurance

For U.S. rentals: The Church has contracts with preferred suppliers that include full liability and collision insurance.

Drivers should not accept any additional insurance coverage for U.S. car rentals when using the Church's preferred suppliers and contracts.

If a preferred supplier is not available, the traveler should accept the liability and collision insurance offered by the car agency.

For international rentals (including Canada and Mexico): The Risk Management Department requires travelers to purchase liability (LDW) and collision/comprehensive (CDW) coverage. If there is an accident and the traveler does not have this additional coverage, the traveler could be detained before leaving the country.

One-Way Rentals

If a traveler's plans dictate a one-way rental (a drop-off at a location other than where the automobile was rented), the traveler should advise the travel agent (for agent-assisted bookings) or place a comment in the appropriate block (for online bookings) when booking.

The agent will review options to secure the best possible rate. Be aware that drop-off and mileage charges can be high, depending on the distance from the renting location and the cities involved.

Payment of Car Rentals

All car rentals must be charged to a Church-designated corporate credit card.

Personal Car

Travelers should select the most economical means of travel. Personal vehicles may be used for business trips as long as the reimbursed mileage expense would not exceed the airline ticket and car rental expense. If travelers choose to drive a personal car instead of flying when flying would have been more economical, they will be reimbursed for the cost of airfare or mileage plus meals and lodging, whichever is lower.

Travelers must have sufficient automobile liability and property damage coverage. The Church will not pay for damage, mechanical repair, service, or insurance of personally owned vehicles used for Church business.

Travelers will be reimbursed on a per-mile rate that is published each year by the Vehicle Review Committee. If a traveler chooses to have another individual drive him or her to or from the airport in lieu of parking, the mileage both ways may be reimbursed.

Airport parking expenditures are reimbursable. Travelers should select the most cost-effective parking options. In locations where there are no specific preferred agreements, a taxi or car service may be more convenient and less expensive for longer trips.

Taxis and Public Transportation

Travelers should use the most economical and safest mode of transportation. Travelers should consider using local transportation, such as hotel shuttles, taxis, or public transportation between airports, home and the departure point, or between the arrival point and place of meeting or lodging. Such expenditures are properly identified on the expense report.

Lodging

Church travelers must book their lodging through the Church-sponsored self-booking tool or through the

designated Church travel office.

The Church has negotiated rates at specific hotel chains and properties in many major travel destinations. Travelers are encouraged to use these properties whenever possible so that the Church can leverage its purchasing power and meet room night commitments. The Church-negotiated rates can be accessed through Church Travel Services, area travel services, or the Church-sponsored self-booking tool.

If a traveler books lodging for an international trip directly through the area office to take advantage of local contract rates, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses.

Cancellations and Changes

Hotel reservations made by Church Travel Services are guaranteed for late arrival unless otherwise specified, such as when the traveler's corporate or department credit card is required to confirm and guarantee the hotel reservation.

If the traveler needs to cancel a reservation, it is his or her responsibility to contact a Church travel agent or to contact the hotel directly to cancel the reservation in order to avoid a no-show fee. A cancellation number will be provided, relieving the Church and the traveler of any obligation for payment. It is advisable to note the cancellation number in case a dispute occurs. Contact information is on the itinerary. Travelers should refer to their itinerary for the hotel cancellation policy. It is the traveler's responsibility to be aware of advance notice requirements for cancellations or changes. Failure to cancel a hotel reservation in a timely manner may result in non-reimbursement of the expense.

If the traveler changes lodging plans, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses.

Because pre-booking is not always possible for driving trips, these trips may be exempt from the lodging policy.

Conferences and Conventions

Because conference and convention sponsors often negotiate special rates with hotels, the traveler should book a room directly with the hotel if Church Travel Services cannot secure the same rate.

If the traveler books lodging directly with the convention property, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses. This will also allow the Church travel office to give the traveler a complete itinerary.

If the convention is not at a preferred property and a lower rate is available nearby, the traveler should consider staying at the Church's preferred property.

Lowest Logical Rate

Travelers are encouraged to book hotel rooms at or near the lowest logical nightly rate available. Church Travel Services will use the following criteria to determine the lowest logical nightly rate:

- Church-negotiated rates
- Restricted discount rates
- Promotional or bulk rates
- Lower-cost safe and acceptable non-preferred hotels

When determining the lowest logical rate, the traveler should consider additional benefits, such as free breakfast, distance to the event, parking and Internet access.

Payment of Charges

All hotel expenses should be charged to a Church-designated corporate credit card.

Reward Programs

Use of hotel reward program benefits must not influence the traveler's decision when arranging travel for Church business. Reward program membership fees may not be reimbursed. Hotel rewards may be retained for personal use.

Telephone and Internet Charges

Telephone calls for business purposes are authorized and will be reimbursed upon completion and approval of a trip expense report.

To avoid substantial surcharges added by hotels, telephone calls should not be charged to the traveler's hotel room. Instead, travelers should consider using calling cards or calling from local Church offices to minimize unnecessary phone expenses.

Travelers may want to investigate communication packages offered by hotels that could include local, long distance and Internet charges.

Travelers should be aware of their international and roaming rates when using a cellular phone.

When possible, reasonable personal calls should be defined by your supervisor or manager before your trip.

Tipping

Gratuities should be limited to the reasonable norm within the country and should be included in the amount shown for the applicable expense. It is reasonable to report gratuities to skycaps, hotel porters, maids and bellhops as "tips." These will then be reimbursed to the traveler as part of the expense report process.

Miscellaneous

Business Meals and Activities for NonChurch Employees

It may occasionally be necessary to host business contacts outside of Church offices. Such meals and activities should not be lavish and should be necessary to conduct business. Receipts are required and the host should record the following information on the receipt:

- Date
- Department and project
- Name of guest
- Name of guest's company
- Type of expense, such as dinner or lunch
- Establishment name
- Establishment city

- Business purpose

Combined Business and Personal Travel

When a traveler chooses to combine business and personal travel, the Church will not pay for lodging, meals, or other costs incurred during any additional personal time.

Daily Meal Allowance

Meal expenses directly related to travel will be reimbursed. The Church does not have a set daily meal limit. Travelers should dine at reasonably priced establishments and exercise reasonable judgment in the selection process.

Emergencies While Traveling

The Church contracts with a worldwide travel service to handle emergencies for those traveling on Church business. This service provides medical attention, access to multilingual doctors and evacuation assistance. The director for temporal affairs works with travel personnel in the Materials Management Department to make sure those who are traveling have access to this service.

Expense Reporting

Expense reports are to be submitted within one week of returning from a trip. Frequent travelers and travelers working away from Salt Lake City or the area administration office may receive special permission from Church Travel Services or the area administration office to submit their reports monthly. Church Travel Services or the area administration office will reimburse travelers for authorized travel expenses as soon as possible after receiving the expense report.

Immunizations

Immunizations may be required when traveling abroad. Travelers working in the Salt Lake City area should visit the health unit in the Church Office Building for assistance with immunizations. Non-Church employees should contact their local health provider for assistance. Spouses and travelers outside the Salt Lake area but living in the U.S. should contact their county health office for assistance. Travelers working outside the U.S. should contact their local health provider for assistance.

Miscellaneous Reimbursable Expenses

Receipts are required for all miscellaneous reimbursable expenses. If you are unsure that an expense is reimbursable, please speak with your supervisor or manager **before incurring** the expense. The following expenses will be accepted for reimbursement when they are directly related to Church business:

- Business telephone calls and limited personal calls
- Tips (consistent with local customs)
- Parking, tolls and airport fees
- Currency conversion and traveler's checks
- ATM and credit card fees for cash advances
- Laundry expenses for trips lasting longer than six days
- Passport and visa (These need to be obtained through the designated Church travel office.)
- Required immunization costs
- Excess baggage charges when required for business purposes

Non-reimbursable Expenses

Expenses that are not considered business expenses and are not reimbursable include the following:

- No-show fees for hotel rooms or car services that were not properly cancelled
- Traffic fines, court costs, attorney's fees, parking tickets, or moving violations
- Frequent flyer and hotel loyalty program costs
- Air travel insurance and personal trip insurance
- Personal reading materials, such as books and magazines
- Health spa or gym memberships
- In-flight or in-room movie rentals or local entertainment
- Luggage and briefcases
- Baggage insurance

- Pet or home sitting
- Shoe shine
- Souvenirs and personal gifts
- Babysitter fees
- Credit card membership fees
- Haircuts
- Lodging costs while staying with a friend or relative
- Calls from airplanes using in-seat phones (except for emergencies)

Passports and Visas

Passports are required for all international travel. Travelers are responsible for obtaining the necessary passports and visas. U.S. citizens living in the United States should use Church Travel Services to submit passport applications. Citizens of other countries should contact their local government agency to obtain passports. The time required to obtain these documents varies by country and may be a few days or several months. Travelers need to allow sufficient processing time for any needed passports and visas.

Preferred Vendors

For the most current list of preferred travel providers, visit the Church-sponsored self-booking tool or talk to the designated Church travel office.

Receipts

Original receipts are required for all reimbursable expenses in excess of \$25, or local specified amounts, where receipts are normally given. These receipts are included with the traveler's expense report.

Travel Insurance

The Church will **not** reimburse the traveler for any personal insurance premiums. All travelers are covered by corporate travel insurance as long as the airfare was charged to a Church-designated corporate credit card or the Church travel account (CTA). This insurance includes the following benefits:

- \$500,000 common carrier accidental death and dismemberment

- \$1,250 lost or stolen baggage
- Car rental insurance
- Hotel theft insurance
- 24-hour roadside assistance through AAA motor clubs
- Travel, medical and legal assistance

Please note: Travelers are responsible for the safekeeping of personal property (such as clothing, jewelry, money and cameras). The Church assumes no liability for these items.

Traveling with Family

The Church recognizes that travelers may occasionally choose to have family members accompany them on trips for which the primary purpose is Church business. Travelers should receive approval from their manager prior to making family travel arrangements. The traveler should keep track of all expenses on an individual basis and only submit for reimbursement those expenses pertaining specifically to his or her portion of the trip or activity.

When dining, the traveler should calculate his or her share of the meal, note it accordingly on the receipt and submit only that amount for reimbursement. If the trip extends beyond the time that would otherwise be required, the traveler should not submit any additional hotel, food, or car rental expenses for reimbursement.

Travelers must coordinate their portion of all air, lodging and car rental reservations through the Church-sponsored self-booking tool or the designated Church travel office.

Materials and Products

Executive Summary

Ethical Standards

Church leaders and employees are to be honest in all their dealings. Personal business should not be mingled with Church business, nor should Church funds ever be mingled with personal funds.

Garments and Temple Ceremonial Clothing

The Presiding Bishopric is responsible for the worldwide production and distribution of garments and temple ceremonial clothing.

Planning and Purchasing

The Presiding Bishopric establishes standards for materials, production, distribution, and purchasing. The Materials Management Department uses these standards to guide the acquisition of materials and plan for their production and distribution.

Subsidies

The Budget and Appropriations Committee approves all subsidies for Church materials.

Travel

The Church pays for appropriate and reasonable travel costs for those authorized to travel on Church business. The Church Travel Office or area administration office assists travelers with lodging, reservations, and ticketing.

Vehicles

The managing director of the Materials Management Department or director for temporal affairs is responsible for the purchase, maintenance, and disposition of all Church vehicles.

Production, Printing, Distribution, and Mail Services

Church-produced materials are approved following the Church's Correlation approval process. The Presiding Bishopric oversees specifications, schedules, printing, distribution, and mailing.

Translation and Interpretation

The First Presidency and Quorum of the Twelve Apostles determine the languages into which Church-approved materials are translated. The Correlation Department determines the languages into which events are interpreted.

Introduction

Materials purchased and produced by the Church are intended to help members and leaders to learn, live, and teach the gospel; build faith; strengthen families; and administer Church programs.

Presiding Bishopric

The Presiding Bishopric approves the policies and processes for the production and acquisition of Church materials and determines who manages and operates these processes.

Area Presidency

The Area Presidency or Presidency of the Seventy coordinates with the director for temporal affairs to make sure the area is following approved worldwide processes and that they provide Church leaders and members with the materials they need.

Director for Temporal Affairs

The managing director of the Materials Management Department and the director for temporal affairs ensure that employees in the area know how to purchase, produce, and distribute materials according to established policies and processes. They also help Church leaders and employees understand the importance of conserving Church funds and putting them to the best use possible. Area legal counsel and the area controller help the director for temporal affairs ensure that all purchasing, production, sales, and distribution activities are performed by the proper legal entity, are recorded in the appropriate financial ledgers, and comply with laws and regulations.

Planning

Standards

The Presiding Bishopric establishes standards for materials, production, distribution, and purchasing. The Materials Management Department uses these standards to guide the acquisition of materials and plan their production and distribution. The demand for materials changes over time. These changes are taken into consideration to ensure that the production and handling of materials and products remains efficient and effective.

Pricing

The Presiding Bishopric sets prices on Church materials. Members may be requested to pay all or a portion of the cost of an item. To the extent practical, prices established for materials include all operating and production costs. Design, development, and translation of materials are not generally included in pricing but are paid from department operating and project budgets.

Pricing Equalization

Careful efforts are made to make Church materials equally accessible and affordable to all members throughout the world. Materials are uniformly priced within a geographical area, but prices may vary from one geographical area to another to help accommodate differences in affordability.

Subsidies

In order to make Church materials affordable to members around the world, the costs of many materials are subsidized.

The Budget and Appropriations Committee, with assistance from the Presiding Bishopric, sets subsidies on Church materials. The Materials Management Department assists the Presiding Bishopric in monitoring the impact these subsidies have on the Church's budget. The Area Presidency, through the director for temporal affairs, recommends to the Presiding Bishopric adjustments in the subsidy amounts as appropriate for the area.

Additional or Unexpected Costs

Product plans and master schedules are developed for each item produced by the Church. When deviations from approved plans result in additional or unexpected

production costs, these extra costs should not be recovered by including them in the price of the product paid by members. Rather, they should be borne by the organization responsible for the increase.

Purchasing

Approvals and Integrity

International area offices should contact their Purchasing Regional Operations Manager with any questions regarding these policies.

When using Church funds to make purchases, Church employees and organizations follow approved Church purchasing processes and policies. As authorized Church agents, purchasing employees may approve purchasing agreements within approved limits. Levels of authority are set, documented, and monitored by the Materials Management Department or the director for temporal affairs, as assigned by the Materials Management Department.

Church leaders and employees must remain above reproach in their dealings with vendors and suppliers. They should never mingle personal business with Church business or mix Church funds with personal funds. Managing directors and directors for temporal affairs regularly monitor the use of Church funds and resources.

Managing directors and directors for temporal affairs help ensure that employees understand and follow approved purchasing processes. Inappropriate behavior by vendors or employees should be reported immediately to management. Employees are not to accept any combination of vendor gifts, meals, or entertainment exceeding U.S. \$100 per year. Directors for temporal affairs work closely with area managers, controllers, and area legal counsel to ensure that purchasing processes comply with local laws and regulations and that employees understand and follow those processes.

Importing and Exporting

When possible and financially practical, goods and services should be purchased in the local country. Directors for temporal affairs should regularly review the area's importing and exporting practices with area

legal counsel to ensure that these practices comply with laws and regulations.

Contract Administration

Contracts with vendors and suppliers should be closely monitored. The terms and conditions of contracts and purchasing agreements should provide value and reasonable pricing, enabling the Church to make effective and efficient use of its resources.

Contracts should be bid and verified confidentially and impartially. Purchases above U.S. \$5,000 generally require competitive quotes, unless the purchases are under a purchase agreement that was competitively established. High-volume products and services should be purchased only from approved suppliers. Where possible, no more than 20 percent of any single supplier's total purchasing volume should be with the Church.

Contracts should be executed using processes and systems provided by the Church. The language, terms, and conditions should be reviewed by legal experts. Area legal counsel and area controllers preview and periodically review significant purchasing agreements and contracts. The director for temporal affairs and the managing director ensure that the approved contracting process is followed and that the contract identifies all relevant issues, such as product specifications, payment terms and pricing, discounts, warranties, and delivery dates and methods. Digital and hard copies of contracts should be kept in a secure location, as designated by the director for temporal affairs or managing director. Contract performance should be closely monitored, and significant contracts and contract documentation should be periodically reviewed.

Supplier Selection, Image, and Payments

The Church makes contracts only with suppliers and vendors who maintain an image and reputation consistent with the Church. Professional, legal, and ethical relationships with contracted suppliers are the responsibility of the Materials Management Department and the director for temporal affairs.

Suppliers should be able to meet order requirements and quality standards. They should also be financially sound. Poor performance should be discussed with the vendor. If poor performance persists, the area or the

Materials Management Department may take appropriate action to end the relationship.

Before areas enter into local contracts, they should check with the Materials Management Department to determine whether the Church already has a relationship with a vendor. Relationships with multiple qualified vendors should be maintained to preserve competition among vendors.

Discounted payment terms that do not decrease the overall value of the contract and its services should be sought during negotiations. Payment terms should not incur debt or require payment plans.

Deposits

At certain times the Church will have a need for a specialized service or product that only a very small company would have the flexibility to supply. Due to their lean operating nature these small companies may occasionally require an up-front deposit to be able to fund the production of the product needed. These deposits, which should only be used when absolutely necessary, typically range from 20% to 40%

Deposits requested from suppliers for the production of goods and/or services procured for The Corporation of the Presiding Bishop (CPB) and/or The Corporation of the President (COP) are not generally paid. If there is a specific request or requirement for a supplier to receive a deposit because of extenuating circumstances, the following is done to request an exception:

1. A detailed requisition (electronically or written) is completed by the requestor
2. A detailed explanation as to why an exception is needed: a) Person or Department making the request, b) Description of good or service, c) Justification to use the sole or single source supplier for the item, d) Risk(s) if supplier does not conform to specifications, e) Contingency plan if the exception is not approved
3. The requisition is signed by the Division Controller of the requesting department or division with the dollar amount required associated with the order.
4. A Purchase Order needs to be in place with no other exceptions to CPB or COP boilerplate language. If the purchase is over \$150,000.00 annually, a Master

Agreement for Goods and Services is signed prior to any monies exchanged.

Orders for Goods and Services

Purchasing employees are authorized to place orders only for properly approved requests. Nonrepetitive purchases under U.S. \$2,000 for items not found in purchasing catalogs should be ordered through approved suppliers if the annual spend of such purchases exceed US \$10,000. Area limits may be set and approved by the director for temporal affairs, unless otherwise stipulated by the Materials Management Department.

Travel

Employee and Workforce Travel

The Church pays for appropriate and reasonable travel costs for those authorized to travel on Church business. The Church Travel Office at Church headquarters or the area administration office assists travelers with lodging, reservations, and ticketing. The employees' managers approve travel and ensure that travelers comply with Church travel policies. Detailed travel policies are available in the Human Resources section of Policy Point.

Missionary Travel

The Church Travel Office handles all missionary travel. With assistance from the Materials Management Department, the Missionary Department is responsible for the Church's policies related to missionary travel. Detailed missionary travel policies are available from the Missionary Department for those authorized to receive them.

General Authority Travel

The Church Travel Office supports General Authority travel with lodging, reservations, and ticketing. With assistance from the Materials Management Department, the Office of the Presiding Bishopric is responsible for the Church's policies related to General Authority travel. Detailed General Authority travel policies are available from the Office of the Presiding Bishopric for those authorized to receive them.

Vehicles

Purchasing, Licensing, Insuring, and Maintaining Church-Owned Vehicles

The managing director of the Materials Management Department or director for temporal affairs (as assigned) is responsible for the purchase, maintenance, and disposition of all Church vehicles. Vehicles that the Church owns or rents should convey an image that is appropriate for the local membership, culture, and country. Acquisitions should be made following established Church-approved purchasing processes and policies, using a purchase agreement or contract where possible. If no agreements are in place, three competitive bids should be obtained before a purchase is made.

The Church insures all Church-owned vehicles. When a Church vehicle reaches a certain age or mileage, it is traded or sold according to established processes to ensure that the Church receives maximum value and benefit.

Use of Church-Owned Vehicles by Employees and Workforce

Fleet Administration at Church headquarters or the area administration office provides vehicle support for employee and workforce use of Church-owned vehicles. The employees' managers approve use of Church-owned vehicles and ensure that they comply with the Church's vehicle use policies, which are described in more detail in the Human Resources section of Policy Point.

Use of Church-Owned Vehicles by Missionaries

Fleet Administration at Church headquarters or the area administration office provides vehicle services and support for missionaries. With assistance from the Materials Management Department, the Missionary Department is responsible for the Church's policies related to missionary use of Church-owned vehicles. These policies are available from the Missionary Department for those authorized to receive them.

Use of Church-Owned Vehicles by General Authorities

Fleet Administration at Church headquarters or the area administration office provides vehicle services and support for General Authorities. With assistance from the Materials Management Department, the Office of the

Presiding Bishopric is responsible for the Church's policies related to General Authority use of Church-owned vehicles. These policies are available from the Office of the Presiding Bishopric for those authorized to receive them.

Production

Garments and Temple Ceremonial Clothing

The Presiding Bishopric is responsible for the worldwide production and distribution of garments and temple ceremonial clothing.

The Materials Management Department conducts regular product reviews at Church-owned clothing manufacturing plants and distribution centers throughout the world to ensure that approved processes, specifications, patterns, and materials are used. These reviews also ensure that production workloads and inventory are balanced and sales are maintained at appropriate levels.

The managing director of the Materials Management Department or the director for temporal affairs (as assigned) ensures that clothing production plants in the area produce garments and temple ceremonial clothing to the standards, specifications, and volumes approved by the Presiding Bishopric.

Responsibilities

The Materials Management Department has the following responsibilities for production:

- Establish worldwide processes, standards, specifications, patterns, and training guidelines.
- Provide technical support and approval for fabric.
- Determine and administer quality standards.
- Approve commercial contractors and monitor the quality of their work.
- Determine wholesale pricing.
- Monitor worldwide production and approve changes or additions to facilities and equipment.
- Provide scheduling and develop and monitor forecasting for all operations.

International clothing production plants operate under the direction of the Materials Management Department with assistance from directors for temporal affairs, as assigned. These plants have the following responsibilities:

- Meet agreed-upon performance commitments.
- Apply and follow approved processes, standards, and specifications using approved patterns and training guidelines.
- Coordinate quality assessment with the Materials Management Department and ensure quality standards are met.
- Implement approved schedules and forecasts.
- Provide the Materials Management Department with financial, quality, and production reports.
- Make style and size recommendations to the Materials Management Department.

Production Planning and Standards

The Materials Management Department designates locations for clothing production plants, based on production capacity, costs, trade agreements, tariffs and duties, and other related factors.

Worldwide Church clothing production operations produce only the authorized standard patterns, using approved fabrics, styles, stock numbers, bar codes, labels, boxes, and bags. When necessary, the Materials Management Department implements changes to existing sizing, fabrics, and styles according to approved processes and policies. New styles or other changes to ceremonial items are recommended to the Presiding Bishopric, who works with the Temple Department and the First Presidency to obtain approval.

Sacrament Cups

Under the direction of the Presiding Bishopric, the Materials Management Department oversees the production and purchase of sacrament cups worldwide.

Printing

Printing and Production Approvals

The Presiding Bishopric oversees the establishment of printing and production schedules, the binding of Church printed materials, and the safekeeping of all electronic copies and scripture masters. The Presiding Bishopric authorizes the printing of approved Church materials.

Under the direction of the Presiding Bishopric, the Materials Management Department sets production standards to keep costs low while still maintaining the Church's image through high-quality printed materials. Directors for temporal affairs may request help from the Materials Management Department with the production of area printing projects.

Printing Production Schedules and Locations

The Materials Management Department is responsible for worldwide printing locations, production, and contracting. Department representatives conduct quality reviews of Church materials to verify that production meets approved product specifications and standards. In some cases, production orders are issued to vendors to fulfill the Church's printing needs. Production orders include product specifications, signed proofs, quantities, and due dates. Orders for reprints of existing materials are placed by the Materials Management Department.

Fine Art

Under the direction of the Presiding Bishopric, the Materials Management Department oversees the approved database, the printing, and the framing of fine art for temples, offices, meetinghouses, and other Church-owned facilities worldwide. This artwork has been selected because it conveys a spirit of reverence and dignity and is consistent with the Church's desired image. Frequently requested artwork is also available for public purchase through the Church's Online Store or through Materials Management retail stores.

Printers and Copiers

Under the direction of the Presiding Bishopric, the Materials Management Department oversees the purchase, installation, maintenance, and disposal of approved printers and copiers worldwide. The Materials Management Department provides a list of recommended printer and copier models to help area offices and headquarters departments select printers and

copiers.

Distribution

The Materials Management Department oversees the delivery and distribution of Church materials and products and ensures that it is done in a timely way. Members order or purchase materials through the Online Store (store.lds.org), retail stores, and call centers. Distribution methods include but are not limited to air or ground transport, mail, and the Internet.

The Materials Management Department is responsible for the effective and efficient distribution of Church-approved materials. In some cases, this responsibility is assigned to the director for temporal affairs.

Inventory Management

The Materials Management Department, with assistance from directors for temporal affairs, ensures that inventory levels and values are accurately and appropriately maintained to minimize warehouse space, sustain inventory value, and ensure an acceptable level of service. Materials held in inventory should be safeguarded and physically counted according to the frequency established in approved inventory processes.

The managing director of the Materials Management Department or the director for temporal affairs oversees the safeguarding of inventory from theft or loss and records when materials are sold, received, transferred, or adjusted. When inventory is determined to be excess or obsolete and proper adjustments have been made to the financial ledger, the Materials Management Department or the director for temporal affairs determines the best method for disposing of the materials and supervises disposal.

Promotional Materials

The Presiding Bishopric authorizes the preparation of materials used to inform priesthood leaders and members of available materials. Directors for temporal affairs ensure that the materials are culturally appropriate and are distributed to members and leaders.

Purchasing Materials Online

The Church's official Online Store (store.lds.org) is the approved website for purchasing Church materials.

Church Magazines

Church magazines are shipped directly to members whenever possible. In areas where this is not possible, members should be encouraged to access electronic versions through the official Church website (LDS.org). The managing director of the Materials Management Department or the director for temporal affairs is responsible to see that Church magazines are made available to members and, as appropriate, to nonmembers. The Area Presidency and Presidency of the Seventy, working with local priesthood leaders, encourage new subscriptions and renewals of existing subscriptions.

Microfilm and Microfiche

Each distribution center that carries microfilm or microfiche that belongs to the Genealogical Society of Utah is responsible to maintain a tracking system to account for the location of the film or fiche when it is loaned to the public. The managing director of the Materials Management Department or director for temporal affairs is responsible for circulating and collecting the microfilm and microfiche.

Establishing New Warehouses

All requests to establish a new warehouse should be submitted to the Materials Management Department. After conferring with the director for temporal affairs, the Materials Management Department submits the request to the Presiding Bishopric for approval. Distribution warehouses are to be secure and maintained according to approved processes and policies.

Shipping

All shipments made from facilities operated by Materials Management should use approved carriers and vendors and comply with legal requirements, customs, and duty laws.

Retail Sales

Retail stores are established based on approved guidelines and operated following approved processes. Requests to establish a new retail store or remodel an existing store should be submitted to the Materials Management Department. Final approval is given by the Presiding Bishopric. Stores are generally planned for

locations at or near temples; where use of credit cards, electronic banking, or the Internet is limited and making purchases from the Online Store difficult; or where instability in the country makes the delivery of products difficult.

Where possible, approved Church materials are made available for retail sale at Church-owned Deseret Book stores reduce the need to add retail stores without compromising customer convenience. All relationships with Deseret Book stores are managed by the Materials Management Department.

Mail Services

All letters and packages sent to Church-owned facilities should be received and screened at a central location prior to delivery. All outbound letters, packages, and freight must be sent using approved carriers.

Translation and Interpretation

Language Approvals

The First Presidency and Quorum of the Twelve Apostles determine the languages into which Church-approved materials are translated. The Correlation Department determines the languages into which events are interpreted.

Each year, the Curriculum Department provides Area Presidencies with the approved Worldwide Plan for Church Materials. This plan includes a list of materials approved for translation into the languages spoken in the area. Area Presidencies may recommend additional languages and materials for translation and interpretation based on the area's needs.

Managing Translation and Interpretation Work

Only the Translation Division within the Materials Management Department is authorized to provide translation or interpretation support and to administer the translation of scriptures and temple materials.

Translation and interpretation work is prioritized and assigned by the Materials Management Department, in coordination with the Correlation, Curriculum, Media Services, and Information and Communications Services Departments. Under the direction of the Presiding

Bishopric, the Materials Management Department has the responsibility for contracting and overseeing translation and interpretation of approved Church materials worldwide. The director for temporal affairs administers the assigned work of those contracted to perform translation services and oversees the translation employees working in the area, according to the standards, priorities, policies, and processes established by the Materials Management Department.

Finance and Legal

General Policies

Funding

The Council on the Disposition of the Tithes determines how tithes and offerings are used in the Church. The council also approves and monitors all Church budgets. The Budget and Appropriations Committee approves all funding requests and appropriates all funds before they may be spent.

Confidentiality

The Church's financial statements, budget information, and other financial records are confidential and should be made available only to those who need them to perform their job duties. Other requests from Church leaders, employees, or from parties outside the Church, including legal or regulatory agencies, to access financial information must be approved by the director for temporal affairs or the managing director of the Finance and Records Department.

Creating, Changing, or Discontinuing Church Legal Entities

The creation, change, or discontinuance of any Church legal entity must be approved by the Presiding Bishopric and the First Presidency.

Expanding or Introducing New Priesthood Programs

The First Presidency and the Quorum of the Twelve Apostles approve the creation of any new, or the expansion of any existing, priesthood-directed program or operation.

Proper Accounting and Reporting

All operations and financial transactions are to be accounted for in the proper legal entity using authorized financial statements. No transaction should be mischaracterized or misrepresented.

Fund Raising

Church leaders and employees should not participate in, encourage, or organize any fund-raising efforts to support or supplement Church programs or initiatives

beyond those authorized in the *Church Handbook of Instructions*.

Contracts and Signing Authority

Only those authorized and documented on approved certificates of authority or powers of attorney prepared by the Office of General Counsel are authorized to sign contracts and make other commitments that are legally binding against Church entities.

Introduction

A strong financial and legal foundation provides essential support for establishing the Church throughout the earth. The Area Presidency and the director for temporal affairs work closely with the area controller and the area legal counsel to keep Church leaders, employees, volunteers, operations, and funds secure and to ensure that Church funds are spent as authorized.

For financial policies for stakes and wards, see section 16 of the *Church Handbook of Instructions, Book 1: Stake Presidencies and Bishoprics* (2006).

Presiding Bishopric

The Presiding Bishopric, working with the Council of the First Presidency and Quorum of the Twelve, is responsible for establishing financial policies, processes, and controls throughout the Church.

Area Presidency

The Area Presidency works with the director for temporal affairs to ensure that Church funds are used in accordance with approved budgets and that Church leaders and employees in the area follow financial and legal policies. The Area Presidency also teaches the importance of conserving Church funds and assures that financial leadership in missions and local units, including stake and ward financial clerks, is strong (see *Church Handbook of Instructions, Book 1*, 11, 21).

Director for Temporal Affairs

The director for temporal affairs:

- Helps the Area Presidency in their financial and legal responsibilities.
- Ensures that the area receives full value for the money it spends.
- Trains leaders and employees to handle Church funds according to approved policies and processes.
- Ensures that the area has adequate internal controls and a functioning controls committee.
- Ensures that leaders and employees consult with the area legal counsel on legal matters.
- Shares information about area finances, risks, operations, and controls with the Area Presidency and Presiding Bishopric.

Area Controller

The area controller's responsibilities extend to all area operations. The controller reports to the director for temporal affairs, making him aware of all area financial operations. The area controller's responsibilities include:

- Preparing budgets and ensuring that cash is handled safely and managed properly.
- Helping the Area Presidency, the director for temporal affairs and area department managers monitor expenditures.
- Helping managers and employees of area departments implement financial policies, processes, and controls.
- Working with area legal counsel to match financial activities with the approved legal structure and to ensure that all regulatory reporting is accurate and timely.
- Serving on the area controls committee and other area committees to advise the director for temporal affairs and Area Presidency on financial matters.
- Ensuring that all financial transactions are reported in the proper legal entities.

The controller also reports to the Church controller at Church headquarters. This reporting line:

- Establishes an independent fiduciary reporting line

for the controller that can reach the First Presidency when needed.

- Helps the Church controller stay informed about financial issues throughout the Church.
- Allows the Church controller to work with the director for temporal affairs and the area controller to prevent and resolve problems related to financial policies, processes, and controls.
- Allows the area controller to counsel with the Church controller directly as needed.

Managers of Area Departments

Managers of area departments follow approved financial and legal policies and processes and teach them in their departments, with assistance from the area controller. They also establish department financial controls.

Identifying Risks and Maintaining Controls

The Area Presidency ensures that the Church's financial and legal operations are secure in each country in the area. The director for temporal affairs, the area controller, and the area legal counsel ensure that risks related to finance, operations, legal compliance, and the Church's reputation are regularly reviewed and that adequate controls are in place to address those risks.

Area Controls Committee

The area controls committee meets regularly to help the director for temporal affairs identify and manage risk. The director for temporal affairs is the chairman of the committee. Also on the committee are the area controller, a Church controller representative, and others as invited. The area management control auditor serves as the secretary of the committee.

The area legal counsel places items on the committee's agenda and attends committee meetings as often as necessary.

The Church controller supports and trains the director for temporal affairs and the area controller on financial matters, and helps the area with significant control challenges that require headquarters

involvement.

Establishing Proper Checks and Balances

Openness and Visibility

Area personnel should be open about their work and welcome feedback so all involved can identify risks more quickly and address them more easily. The area controller works with area department managers to address risks and controls and prepare financial reports for their departments. This independent view ensures that those who perform the work are not alone when reporting information. Such practices protect Church leaders and employees from false allegations and compromising situations.

Handling Cash

When handling cash, two people must be involved. This practice protects the Church against defalcation and embezzlement, and it protects the individuals against allegations of mishandling or wrongdoing.

Segregation of Duties

In order to safeguard Church funds, the Area Presidency and the director for temporal affairs ensure that duties are properly segregated among employees and among Church leaders in local units. For example, the person handling cash or inventory should not be assigned to record the information on the financial ledger.

Employees

The director for temporal affairs and the area controller make sure that employees' duties are properly segregated; this includes situations where an employee's Church calling may conflict with his or her job duties.

Church Leaders and Clerks

The Area Presidency ensures that there are qualified priesthood holders in wards and stakes so that responsibilities for handling donations and disbursements are properly segregated among leaders and clerks (see *Church Handbook of Instructions, Book 1*, 156–61).

Avoiding Conflicts of Interest

The director for temporal affairs, as advised by managers of area departments, the area controller, and the area human resource manager, is responsible to address all conflicts of interest in the area. A conflict of interest arises when a Church leader or employee is in a position to use his or her assignment for personal financial benefit or to financially benefit a relative or friend. Employees should periodically sign a conflict-of-interest statement, which should be reviewed by their manager. When a potential or actual conflict of interest arises, the employee must notify his or her manager in writing immediately, and provide an updated conflict-of-interest statement.

The Area Presidency ensures that Church leaders understand the importance of avoiding conflicts of interest.

Compliance with Legal and Regulatory Requirements

The Area Presidency, with help from the director for temporal affairs and the area legal counsel, ensures that area operations comply with laws and regulations. The director for temporal affairs regularly reviews compliance with the area controller and the area legal counsel, including the filing of timely financial reports with legal or regulatory agencies.

Budgets

Local Unit Budget Allowance

Local unit budget allowance funds are provided by the Church for activities and programs in stakes and wards. Policies for stake and ward administration of these funds are found in the *Church Handbook of Instructions, Book 1*, 159–61.

The budget allowance is based on Church attendance in the unit. The director for temporal affairs monitors the amounts in each country and recommends changes to the Area Presidency as needed. If the Area Presidency desires a change in the amount, the recommendation is sent to the Presiding Bishopric for submission to the Budget and Appropriations Committee for final approval and funding.

Operating and Project Budgets

The Area Presidency, with help from the director for temporal affairs, recommends an annual budget to support area operations and projects. The recommended area budget is presented to the Council on the Disposition of the Tithes for final approval.

New and Expanded Budget Requests

The Area Presidency, with help from the director for temporal affairs, may request additional money to fund new or expanded programs in the area. This request is sent to the Church Budget Office for submission to the Budget and Appropriations Committee for approval and funding.

Spending

Before Church leaders and employees spend Church funds, expenditures must be authorized by the Council on the Disposition of the Tithes and appropriated by the Budget and Appropriations Committee as part of the annual budget or as part of a new or expanded program request.

Multistake Events

The Area Presidency and stake leaders are responsible for multistake events in the areas, such as young single adult activities. These events are paid for according to local unit budget allowance guidelines. The director for temporal affairs supports the Area Presidency and stake leaders with arrangements for transportation, facilities, safety programs, and so on as needed.

Dedications, Open Houses, and Public Events

Dedications and open houses for temples, meetinghouses, and other facilities, along with public events such as cultural celebrations, are funded through the area's annual budget process or through new and expanded requests as approved by the Budget and Appropriations Committee. The local unit budget allowance should be used only for local unit events. Church leaders should not solicit special donations from members, vendors, or businesses to supplement approved funding provided from Church headquarters for these events.

Financial Records

The director for temporal affairs ensures that all financial transactions in the area are properly recorded according to policies established by the Presiding Bishopric and laws and regulations. All entries on the financial ledger should be supported by documents showing approvals and transaction dates. These documents should be kept on file to support internal, external, and regulatory audits.

The area controller provides independent assurance to the director for temporal affairs that department managers in the area are recording and documenting their financial transactions accurately.

Financial Ledgers

The Presiding Bishopric approves all financial processes and associated technology systems used by the Church. The director for temporal affairs ensures that area financial ledgers and technology systems can produce reports needed to comply with laws and regulations.

Fraudulent Reporting

Church leaders and employees should guard against fraudulent reporting of the Church's operations or financial transactions. They should also ensure that payments are made only for legitimate transactions, that documents are not forged or mischaracterized, that all transactions are coded and dated properly, and that all amounts are accurately stated.

Confidentiality

The Church's financial statements, budget information, and other financial records are confidential. The director for temporal affairs assures the Area Presidency that they are seen only by those who need them to perform their job duties. Other requests from Church leaders or employees or from parties outside the Church, including legal or regulatory agencies, to see financial information must be approved by the director for temporal affairs for the area, or by the managing director of the Finance and Records Department. If laws and regulations require that the Church disclose financial information, the director for temporal affairs consults with the area controller and the area legal counsel to determine what information to provide and

to whom.

Transactions between Church Entities

The area should maintain financial accounts, records, and ledgers that correspond to Church legal entities in order to comply with local laws. When money or goods are transferred between Church entities, whether within the area, between areas, or between the area and Church headquarters, the director for temporal affairs ensures that all involved understand and follow the legal requirements. He also makes sure that the proper legal entity is used, that the transaction is appropriate for the approved legal purpose of the entity, and that the transaction is recorded on the correct financial ledgers.

The director for temporal affairs makes sure goods and services for one legal entity are not paid for with funds from another legal entity without a written document. This document should specify a formal settlement process for the funds paid on behalf of the Church entity.

Handling and Accounting for Funds and Resources

Tithes and Offerings

Bishops have the sacred trust of receiving and accounting for tithing and other offerings (see D&C 119; 42:30–33). They should do this according to the instructions in the *Church Handbook of Instructions, Book 1*, pages 156–58. The Area Presidency, with help from the director for temporal affairs, ensures that Church leaders in the area understand and follow these financial instructions.

Donors cannot place restrictions on how the Church uses tithes and fast offerings. Donations to certain funds—such as the Missionary Funds, Humanitarian Aid Fund, Temple Construction Fund, and Perpetual Education Fund—retain their identity and are used for the purpose for which they were donated, as approved by the Budget and Appropriations Committee.

Any request for a refund of tithing, fast offerings, or any other donations must be approved by the Finance and Records Department or the Presiding Bishopric,

depending upon their nature and amount. All refund requests should be sent to the Finance and Records Department for processing.

In-Kind Donations

Local Church leaders should contact the administration office before accepting an in-kind donation (see *Church Handbook of Instructions, Book 1*, 155). The director for temporal affairs works with the Presiding Bishopric to obtain approval to accept in-kind donations.

Bank Accounts

The director for temporal affairs makes sure area bank accounts are approved by the Finance and Records Department and are recorded on the appropriate legal entity's financial ledger. He makes sure that bank accounts and all other ledger accounts are reconciled on time.

Employees, missionaries, and members should not combine Church funds with money in their personal bank accounts.

Banking Relationships

Church headquarters develops and maintains relationships with banking and investment institutions throughout the world. Before opening a new bank account in the area, the director for temporal affairs determines whether the area's banking needs can be met through one of these existing relationships. If not, the director for temporal affairs, working with the Finance and Records Department, establishes a new bank account. The area controller and the Finance and Records Department work with the director for temporal affairs to determine the credit worthiness and business integrity of the local bank.

Transfer of Funds to Another Country

The director for temporal affairs, working with the area controller and the area legal manager, determines whether it is appropriate for the Church to transfer money outside of the country in which the funds were received as donations. He also ensures that such transfers of funds comply with laws and regulations.

Funding Area Activities and Programs

The director for temporal affairs ensures that payments for all Church activities and programs in the area comply with laws and regulations. Cash is not to be carried across country boundaries to fund Church activities or programs in another country. Likewise, a member's personal bank account should not be used to collect tithes or offerings nor to pay for Church activities or programs that will not be reimbursed.

Cash Management

The director for temporal affairs sees that the area maintains reasonable funds necessary to support day-to-day operations. Excess funds, if any, should be managed by Church headquarters. Before excess funds are transferred to Church headquarters, the director for temporal affairs ensures that the transfer complies with laws and regulations.

Bank Cards

The director for temporal affairs, area department managers, and the area controller should limit the use of cash in performing temporal affairs. One way to limit the use of cash is to use bank cards, including purchasing cards and travel cards. The Finance and Records Department approves the use of all bank-card programs.

Reimbursements to Employees and Church Leaders

The director for temporal affairs ensures that reimbursements to Church leaders and employees are made with proper approval and are supported by appropriate receipts. Whenever possible, employees should use Church-approved bank cards to limit the need to carry cash.

Philanthropic Gifts

The Presiding Bishopric supervises LDS Philanthropies, through which members and friends of the Church can make philanthropic gifts beyond tithing and other offerings (see *Church Handbook of Instructions, Book 1*, 156). When a philanthropic gift is offered, the director for temporal affairs contacts LDS Philanthropies to obtain approval and determine how to accept the gift. The Area Presidency, the director for temporal affairs, and other Church leaders and employees should be helpful to those wanting to give

but should not solicit such gifts.

Trusts

Under the direction of the Presiding Bishopric, LDS Philanthropies and Deseret Trust Company administer trusts and related assets that have been donated to the Church. Areas, stakes, and wards are not authorized to accept, be involved in, manage, or administer trusts or trust funds locally. The director for temporal affairs, working with LDS Philanthropies and Deseret Trust Company, helps members who want to make donations through trust arrangements.

Emergency Funding

The director for temporal affairs works with the Finance and Records Department to ensure that emergency funding is available for a limited period to support area operations, mission presidents, and missionaries in an emergency. The director for temporal affairs reviews the area's emergency funding plan periodically with the Area Presidency.

Physical Safeguards and Controls

The director for temporal affairs ensures that appropriate safeguards and controls are in place to protect assets such as equipment, computers, inventory, and vehicles from theft and damage. The area controller and the appropriate area department manager inspect these assets regularly to verify that correct quantities are present and security is in place.

Taxes

In consultation with the Finance and Records Department, the director for temporal affairs is responsible to ensure that:

- The tax-exempt status of the Church's ecclesiastical operations in a country, and where applicable, the deductibility of donations to the Church, are not jeopardized.
- When legally required, taxes are paid properly and on time.
- Managers of area departments understand issues concerning value-added, sales, property, income, and other taxes due, and comply based on the law.

Employee Benefit and Pension Plans

Pension plans are frequently regulated by government agencies and may be mandated by law. In many countries the law requires that pension plans be administered by trustees or directors living in the area. Members of the Area Presidency or the director for temporal affairs should not serve as a director or trustee to area pension plans.

Church headquarters provides technical and administrative assistance with all of the Church's benefit and pension plans. The area should work with the Human Resource Department to avoid and resolve pension and retirement problems.

The area legal counsel provides legal advice regarding the plans to keep the area compliant with the laws. When requesting a new plan or change to an existing plan, approval from the Church Human Resource Committee is needed.

Audits

Internal Auditors

The Church's internal auditors, independent of management, provide information that helps management maintain orderly and efficient operations. The Church Auditing Department audits Church operations and programs and determines the frequency and nature of audits.

Loss, Theft, Embezzlement, or Misappropriation of Church Funds

The Church Auditing Department has responsibility to investigate all instances of loss, theft, embezzlement, or misappropriation of Church funds, whether in local Church units, Church operations, or Church projects. If a member suspects that loss, theft, embezzlement, or misappropriation of Church funds has occurred, the stake president or chairman of the stake audit committee should be notified promptly. The stake president or chairman of the stake audit committee then immediately notifies the Church Auditing Department (if the unit is in the United States or Canada) or the area controller (if the unit is outside the United States and Canada). If

after preliminary review the area controller determines that a loss, theft, embezzlement, or misappropriation is likely, the area controller notifies the Church Auditing Department.

The Church Auditing Department will direct the investigation, including oversight and reporting.

External Auditors

The director for temporal affairs hires external auditors as needed and with the approval of the Church controller and the managing director of the Church Auditing Department.

Area Audit Program

The Presidency of the Seventy or the Area Presidency organizes an area audit committee in each area of the Church. The committee strengthens and protects priesthood leaders and the sacred funds of the Church. The committee consists of a chairman (Area Presidency member or assistant to the Presidency of the Seventy), area auditor, director for temporal affairs, controller, and may include a representative working with local unit finances.

Under the direction of the Area Audit Committee Chairman, an assistant area auditor is called to serve in each Church coordinating council—he reports to the area auditor. Assistant area auditors provide training on Church audit and financial policies and procedures to local unit priesthood leaders, clerks, audit committees, and auditors. They work with the Area Seventy and stake leaders to ensure that stakes, missions, and districts:

- Conduct thorough and complete audits.
- Submit audits on time.
- Correct all exceptions discovered during the audits.

The Church Auditing Department provides training and support to area audit committees, area auditors, and assistant area auditors.

(See Guide to the Area Audit Program.)

Office of General Counsel and Area Legal Counsel

The Office of General Counsel provides legal counsel and oversees legal services to the Church. The Office of General Counsel appoints a qualified attorney to serve as the area legal counsel. The area legal counsel is part of the Office of General Counsel and has the following responsibilities:

- Provide legal support to the Area Presidency and director for temporal affairs.
- Direct legal services in the area, including the work of outside legal counsel
- Work with the director for temporal affairs and the area controller to ensure compliance with laws and regulations, and that regulatory filings are completed accurately and on time.

Introducing New Church Operations and Programs

The First Presidency and Quorum of the Twelve approve new priesthood-directed operations or programs in an area. When such operations or programs are approved:

- The Area Presidency provides priesthood direction and meets with local Church leaders to explain the operation or program, and to coordinate the implementation.
- The director for temporal affairs coordinates temporal and support activities and ensures that processes and technology systems are implemented correctly and that those who use them are trained properly.
- The area controller facilitates payments and fund transfers, as needed, and ensures that Church assets are protected.
- The area legal counsel, working with area management, ensures that the operation or program complies with laws and regulations.

Legal Entities

A legal entity is a structure organized in a country that allows the Church to operate and be officially recognized by the government. A legal entity is established for specific purposes, with limits set on the types of activities it can conduct. Legal entities should be

organized, maintained, and protected according to Church policies and local laws.

Creating Legal Entities (See Chart, “Steps for Creating, Changing, or Dissolving Legal Entities.”)

New legal entities require the approval of the Presiding Bishopric and the First Presidency. When a new entity has been approved, the area legal counsel establishes the entity according to laws and regulations. The Area Presidency relies on the director for temporal affairs to make sure:

- Financial records, bank accounts, and funds for the new entity are managed and controlled.
- Managers of area departments implement required processes and establish accounting and cash controls for the new entity.
- The new entity operates within the mandate of its legally approved activities.

The Office of General Counsel and the Church controller ensure that the entity’s legal structure and accounting and reporting structures are in harmony with the Church’s financial and legal policies.

Maintaining Legal Entities

The Office of General Counsel ensures that the Church’s legal entities in the area are in good standing with the government. The Area Presidency approves all necessary directors and officers for the Church’s legal entities in the area.

Dissolving Legal Entities

The Area Presidency and the director for temporal affairs, along with the Office of General Counsel and the Church controller, should look for ways to simplify Church operations, including limiting or reducing the number of legal entities.

Legal Proceedings Brought against the Church

The area legal counsel should be informed immediately when any legal claim is threatened or brought against the Church, its leaders, and its employees. Church leaders and employees should not

accept legal notices, summonses, garnishments, warrants, or other legal process documents on behalf of a Church entity unless the area legal counsel advises them to do so. When possible, they should refer the person serving the process to the area legal counsel or to a person designated by the area legal counsel. The area legal counsel informs the Area Presidency and the director for temporal affairs, who keeps the Presiding Bishopric informed.

Employees, missionaries, and Church leaders should not admit responsibility on behalf of the Church in any threatened or actual claim against the Church. The Office of General Counsel, working with the Finance and Records Department, provides recommendations on how to resolve threatened or actual claims. Only the Office of General Counsel can admit responsibility on behalf of the Church.

Claims Asserted by the Church

The Office of General Counsel must give approval before anyone may assert a claim on behalf of the Church.

Abuse

In allegations of abuse, the area legal counsel consults with the Area Presidency and the director for temporal affairs and addresses legal reporting requirements for the country where the alleged abuse occurred. Abuse involving Church leaders, members when acting in their Church responsibility, employees, or missionaries should be reported immediately to the Office of General Counsel.

The Area Presidency ensures that all Church leaders in the area understand the Church's policies regarding abuse, as outlined in the *Church Handbook of Instructions, Book 1*, 186.

Using Outside Legal Counsel

Hiring

Only the area legal counsel may retain outside legal counsel. The area legal counsel finds the most qualified and responsive outside legal counsel possible, given the relevant issues, costs, and deadlines.

Handling Church Funds

Outside legal counsel should not directly control any Church funds. Powers of attorney issued to outside legal counsel with respect to litigation or other matters that might involve payments to the Church should be limited so that all payments are made directly to the appropriate Church legal entity. The area legal counsel works closely with the director for temporal affairs and the area controller to make sure all arrangements with outside legal counsel are reported in the proper legal entity's financial ledger. If it is not possible to avoid having outside legal counsel handle Church funds, the director for temporal affairs and the area controller help the area legal counsel put controls in place to minimize the possibility of misappropriation or loss of funds.

Intellectual Property

Intellectual Reserve, Inc., owns and preserves key intellectual property of the Church, including copyrights and trademarks or key identifiers. This entity helps area personnel use and preserve appropriate and legally protected intellectual property.

Copyrights

Maintaining complete and exclusive ownership of Church materials is important to the mission of the Church. As a condition of employment, all Church employees and independent contractors should give to the Church all rights (or as many rights as the law permits) to works they create in the performance of their job duties. When it becomes necessary to register trademarks, the Intellectual Property Office at Church headquarters registers the trademark.

Trademarks and Key Identifiers

A trademark is a word or phrase, a symbol, or a picture that uniquely identifies the Church. They should be used only in approved circumstances.

The First Presidency designates which trademarks will be used as key identifiers, such as the name of the Church, the Church logo, or the word "Mormon."

Contracts and Authority to Commit the Church

Only those authorized by the Area Presidency and the director for temporal affairs, who are documented

on approved certificates of authority or powers of attorney prepared by the Office of General Counsel, are authorized to sign contracts and make other commitments that are legally binding against Church entities.

Government Relations

The Area Presidency is responsible for government relations in the area. They are assisted by the director for temporal affairs, the area legal counsel, public affairs personnel, and Church leaders and members, as appropriate. The Area Presidency closely coordinates their efforts with the member of the Quorum of the Twelve who oversees that part of the world.

Member, Leader, and Unit Services

Executive Summary

Access to and Use of Church Records and Information

Church records and the information they contain are the property of the Church. They may not be used for personal, commercial, or political purposes. Membership records may be viewed by the member, by Church leaders who have responsibility for the member, and by those who have been officially authorized.

Approved Church Reports

Reports should not be generated or information gathered and stored outside of the approved reports, computer systems, and electronic databases provided by the Church.

Sensitive Records and Information

Records and information relating to Church discipline, sealing cancellations or clearances, and blessing restoration are sensitive and are maintained by Church headquarters. No other copies of these records and the information contained on them should be kept.

Records and Information Management

Records and the information contained on them should be managed so that:

Essential information is collected and maintained, use is limited to official purposes, release is controlled, and historical records and information are preserved.

Laws regarding individual rights, data privacy, and transborder data flow are followed.

There is physical security, restricted access, proper retention, and controlled disposition.

Introduction

One of the first commandments given in this dispensation was “There shall be a record kept among you” (D&C 21:1). Later the Lord revealed that when ordinances are performed with the proper authority and “a proper and faithful record” is kept, the ordinance is

valid “on earth and in heaven, and [cannot] be annulled” (D&C 128:9).

The Church records, maintains, and reports information on members, leaders, and units to:

Record ordinances.

Help priesthood leaders know their members and understand their needs (see Moroni 6:4).

Evaluate the needs of Church members, units, and programs.

Provide names and contact information.

The Church also records, maintains, and generates reports in support of its operations, functions, and activities. In addition to Church use, these records and reports may be mandated by law or government regulation.

Presiding Bishopric

The Presiding Bishopric approves the processes for member, leader, and unit information work throughout the Church and determines who will manage and operate these processes. They are responsible for maintaining and safeguarding member information, and for providing information about Church members to Church leaders who have responsibility for the member and a valid need for the information.

Managing Director

The managing director of the Finance and Records Department reports to the Presiding Bishopric. As directed by the Presiding Bishopric he is responsible for the global management of member, leader, and unit processes, as well as associated training and evaluation.

Area Presidency

The Area Presidency helps ensure the accuracy, completeness, and timeliness of records and reports in the area by teaching and encouraging local leaders regarding their record-keeping duties, and by following

up as needed with priesthood leaders to ensure records and reports are properly prepared and submitted on time. They also assure that the record-keeping leadership in missions and local units, including stake and ward clerks, is strong.

Section 15 of the *Church Handbook of Instructions, Book 1: Stake Presidencies and Bishoprics* (2006) contains record-keeping instructions specific to Church leaders and clerks in stakes and wards.

Confidentiality of Records

Church records are confidential and often include sensitive information. The Area Presidency teaches Church leaders and those who are entrusted with this information to safeguard it against inappropriate disclosure.

Church records are not to be used for personal, commercial, or political purposes.

All laws and regulations should be complied with regarding data privacy and the transfer of data between countries. The Data Privacy Office at Church headquarters can answer questions that may arise concerning data privacy laws and regulations.

For more information, see the *Church Handbook of Instructions, Book 1, 150–51*.

Disclosing and Accessing Information

The Information Release Policy at the end of this section describes who can view or receive membership-related information from Church records. Because of the complexity and the variety of laws and regulations that govern this information, requests to release information that do not comply with the Information Release Policy should be referred to the Presiding Bishopric through the Finance and Records Department. Questions or requests from regulatory agencies or individuals are referred to the Data Privacy Office at Church headquarters.

Direct computer access to the Church membership information system is authorized only for membership records personnel.

Types of Records and Reports

The Church maintains statistical information for use by General Authorities, Area Presidencies, managing directors, and directors for temporal affairs in an online system called the Church Information Resource System (CIR). Managers of membership records personnel also have access to this system. In addition to Church statistics, the Church Information Resource System (CIR) includes facility addresses, leader contact information, and maps of areas, stakes, missions, and temple districts.

The director for temporal affairs provides reports to the Area Presidency identifying units and programs that may need additional guidance. In most cases reports needed by the Area Presidency can be prepared using the Church Information Resource System (CIR), membership records, and standard Church reports.

Requests should not be made of stakes and wards to gather statistics and prepare regular reports in addition to the Church's approved reports. Areas, missions, and local units should not develop local manual or computer systems to gather statistics beyond the Church-approved reports and databases.

If information is needed that is not contained in Church-approved reports and databases, contact the Management Information Center at Church headquarters. The Management Information Center has historical and global data for analysis within areas or for comparison with general Church trends.

Membership Records

Membership records personnel provide copies of membership records for the Area Presidency when requested. Membership records are confidential; they should be viewed only by Church leaders who have responsibility for the member. Members may view their own membership record and may obtain a printed copy of their Individual Ordinance Summary (IOS), which contains much of their membership information.

The ward clerk is responsible for updating most of the information in membership records. Information about temple ordinances, however, is recorded by temple personnel; information about Church discipline and missionary service is recorded at Church headquarters; and information necessary to create a new membership record for a convert and record his or her baptism and confirmation is recorded by the mission.

For more information, see the Information Release Policy and the Church Handbook of Instructions, Book 1, 145–50.

Lists and Directories of Members

The ward or stake clerk uses Church record-keeping software called Member and Leader Services (MLS) to record membership information and prepare various reports and documents, such as membership records, certificates, directories, and lists of members. If the ward or stake does not have MLS, the administration office can provide lists, directories, and reports to the bishop or stake president. See pages 144 and 177 of the Church Handbook of Instructions, Book 1, for a description of the kinds of lists and directories that can be prepared and who should be included.

The Area Presidency may ask the director for temporal affairs to provide quantitative reports from membership information to assist them in evaluating strengths and needs in the area.

Church Directory of Organizations and Leaders

The Church Directory of Organizations and Leaders (CDOL) is an automated directory maintained by Church headquarters. It includes information about Church leaders, other Church and area personnel, Church units, seminaries and institutes, bishops' storehouses, recreational properties, temple districts, welfare regions, employment resource centers, and so on. Access to this directory is limited to Church leaders and personnel who need the directory to fulfill their Church responsibilities.

From the Church Directory of Organizations and Leaders (CDOL), Church leaders and personnel can print directories that include all or parts of an area. This eliminates the need for areas to produce and maintain local versions of area directories.

Certificates for Bishops, Stake Presidents, and Patriarchs

When a member is ordained a bishop or patriarch or set apart as a stake president, he receives a certificate bearing the signatures of the First Presidency. This certificate is prepared at Church headquarters and mailed either to the member or to the director for temporal affairs for distribution to the member.

Patriarchal Blessings

Only Church headquarters should maintain copies of patriarchal blessings. The patriarch sends a copy to the member and a copy to Church headquarters. Church personnel should not provide translation of patriarchal blessings.

For more information, including information about how to obtain copies of blessings, see *Church Handbook of Instructions, Book 1*, 42–44.

Priesthood Lines of Authority

The First Presidency has authorized membership records personnel to assist Melchizedek Priesthood holders in the preparation of priesthood lines of authority for Melchizedek Priesthood conferral (usually ordination to the office of elder) and ordination to the office of high priest. Members request this assistance by using a Melchizedek Priesthood Line of Authority Request form or contacting the administration office directly. Stake or ward leaders may ask the administration office for assistance in behalf of members in their unit. The administration office works with the local unit and with Church headquarters to determine what information is available to complete a line of authority.

Quarterly Reports

The ward clerk prepares a Quarterly Report, under the direction of the bishop. The Quarterly Report is submitted according to the instructions on page 144 of the Church Handbook of Instructions, Book 1. This report includes information about such things as meeting attendance, home and visiting teaching, new members, and temple recommend status of endowed members.

Using information from Quarterly Reports, the activity levels of areas and local units can be monitored. Quarterly Reports are also used at Church headquarters to help monitor the overall activity levels of the Church and its programs.

Records Relating to Church Discipline

In most instances, the Area Presidency's direct involvement with records relating to Church discipline is limited to training and counseling stake presidents in

their duties. In some areas, the Area Presidency may also assist in gathering documents to be submitted to Church headquarters. Areas, stakes, and wards should not keep copies of these documents or generate statistics related to Church discipline.

Aside from limited clerical tasks occasionally requested by Church headquarters, the director for temporal affairs and the administration office are not involved with records of Church discipline.

Tithing Records

Annual Tithing Status and Declaration Report

Each ward should prepare an Annual Tithing Status and Declaration Report. Membership records personnel in the area ensure that all Annual Tithing Status and Declaration Reports are sent to the administration office. The director for temporal affairs provides the Area Presidency with summary data from the Annual Tithing Status and Declaration Reports.

The Area Presidency teaches the importance of tithing and uses information from Annual Tithing Status and Declaration Reports as an indicator of ward, stake, and area tithing performance. The Area Presidency may review summary data from the report but should not view information about contributions of individual members.

In two specific circumstances the director for temporal affairs may personally access an individual's donation information:

If the individual requests information about his or her donations for prior years.

If the Area Presidency requests information on an individual who is being considered for a significant calling.

Prior-Year Tithing Information

Members may request a record of the tithing and other offerings they have donated to the Church. The administration office may prepare a letter containing this information and send it to the member. Information about in-kind donations should be included, if applicable, but no specific monetary value should be indicated.

Annual Histories

The Area Presidency encourages local units to create and submit annual histories according to the instructions on page 150 of the Church Handbook of Instructions, Book 1.

Area or Country Histories

The Area Presidency may request the preparation of an area or country history. Such histories normally coincide with a significant historical event. Instructions for preparing these histories are found on page 150 of the Church Handbook of Instructions, Book 1.

Missionary Recommendations and Call Letters

Missionary candidates, bishops, and stake presidents are responsible to prepare and submit missionary recommendations. The Area Presidency may request assistance from the administration office to verify the completeness and accuracy of information on the recommendation form that can be obtained from the membership records. This assistance may be especially needed if up-to-date membership information is not readily available in local units. Membership records personnel should not relieve the missionary candidate, bishop, and stake president of their responsibility to submit properly prepared recommendations.

Membership records personnel in the area may be asked to forward a missionary call letter to a member or verify his or her address and unit. Other administration office personnel may be involved in providing visa and travel assistance.

Helping Members Determine Which Unit They Belong To

Members who want to find out which unit they belong to can use the Meetinghouse Locator on the official Church Web site, LDS.org. This site gives meetinghouse addresses, maps, and meeting schedules. When automated information is not available or accurate, the administration office can also help members determine which unit they belong to.

Maps of Ecclesiastical Boundaries

The administration office ensures that maps of

units—including missions, temple districts, and areas—are provided to Church leaders as appropriate. These maps are obtained from the Finance and Records Department.

Creating, Changing, or Discontinuing Units

Instructions for creating, changing, or discontinuing Church units are found on pages 167–71 in the Church Handbook of Instructions, Book 1. As the Area Presidency fulfills their responsibilities in this process, they may request help from the director for temporal affairs. For example, they may ask the director for temporal affairs to provide unit maps or other statistics for stake or mission presidents. To recommend creating, changing, or discontinuing a mission or temple district, the Area Presidency contacts the appropriate priesthood council at Church headquarters.

Clerk Support and Training

The stake clerk has the primary responsibility for training ward clerks. By using automated and online training materials, performing membership and financial audits, and calling upon his personal experience, the stake clerk should be able to resolve most record-keeping issues.

The Area Presidency may ask the director for temporal affairs to use area personnel or the local unit area auditor/trainer to train stake clerks. The stake president may request such training for his stake clerk by contacting the Area Presidency or the director for temporal affairs.

Records Management

The Area Presidency, with help from the director for temporal affairs, ensures that:

Only essential information is collected or maintained.

Information is used only for the purpose for which it was collected.

Information is released only to those authorized to receive it (see Information Release Policy).

Information is properly retained.

Individual rights are protected, laws and regulations regarding data privacy and information transfer between countries are followed, and the handling of confidential information is monitored.

Protection

In order to properly safeguard information controlled by the Church, the administration office ensures that records are physically secure, properly restricted, and protected by a password if in an electronic format.

Retention

Time lengths for retention are based on legal requirements, record content, and business needs. Records are to be kept no longer than needed. (See Church Handbook of Instructions, Book 1, page 151.)

When records or reports are no longer needed, they should be destroyed. Paper records should be shredded, and records stored in electronic media should be destroyed rather than simply erased.

Area Presidency Records

Members of the Area Presidency are entrusted with information that is sacred and confidential. This information may be recorded in a variety of documents, such as meeting minutes, correspondence, or personal journals. Any record that is created or received during the service of a member of the Area Presidency that relates to or describes Church matters is the property of the Church. Such information should not be divulged to others. The Area Presidency should ensure that this information remains in Church possession and does not pass to heirs or other people.

Members of the Area Presidency may request permission from the Presidency of the Seventy and the Executive Director of the Family and Church History Department to obtain a personal copy of records pertaining to their own Church service. Any sacred or confidential information will be eliminated before a copy is given. Family members may also request copies.

Area Presidency members should keep personal files and records that do not relate to area assignments separate from area records. They should store Church records in a single location, usually in the administration office, rather than at home or elsewhere. They should

retain and dispose of Church and personal records in accordance with the policies and recommendations provided by the Presidency of the Seventy and Church Archives personnel. An archivist in the Family and Church History Department is available to work with the Area President's secretary to answer filing questions, develop a plan for dealing with area records, assist in the purging of records, and the transfer of records of enduring value to Church Archives.

Physical Facilities

Executive Summary

Expenditures and Commitments

Expenditures or commitments for expenditures may be made when the Budget and Appropriations Committee has given approval and appropriated funds.

Controllershship and Compliance

Real estate purchases and dispositions should properly convey title, accurately transfer funds, and comply with laws and regulations.

Real Estate Acquisition

Church properties such as meetinghouses, institutes of religion, mission homes, mission offices, welfare operations, and other similar or related properties are acquired locally by the area. The purchase of all other property is directed by the Budget and Appropriations Committee at Church headquarters.

Sharing Facilities

Church facilities should, where possible, be used to their maximum capacity before new space is provided, which may require different organizations to share the same facility.

Property Disposition or Facility Razing

Property may be disposed or facilities razed when approval has been given by the Budget and Appropriations Committee.

Temples

The purchase of property for, and the design, construction, and maintenance of temples are directed by the Temple Sites Committee at Church headquarters.

Property/Facility Maintenance and Care

Church-owned real estate and facilities are maintained according to standards set, and with annual plans approved by the Budget and Appropriations Committee.

Introduction

The Church purchases land and provides facilities to give Church members places where they can worship, teach, learn, pray together, make and renew covenants, and receive sacred ordinances (see D&C 59:9; 109:8; 124:38). The Area Presidency and director for temporal affairs are responsible for the purchase and operation of such property, which may include temples, meetinghouses, institutes of religion, mission homes and offices, welfare operations, and others.

The Church also acquires investment properties to earn a return on funds invested or to hold for future purposes. The Presiding Bishopric directs their purchase and operation.

Presiding Bishopric

The Presiding Bishopric approves the processes for physical facilities work throughout the Church and determines who will manage and operate these processes. Consolidated Physical facilities plans for all areas of the world are presented annually to the Budget and Appropriations Committee by the Presiding Bishopric. The Presiding Bishopric also has the responsibility to review all exceptions to annual physical facilities plans and submit them to the Budget and Appropriations Committee for consideration.

Managing Director

The managing director for physical facilities reports to the Presiding Bishopric. As directed by the Presiding Bishopric he is responsible for the global management of physical facilities processes, the consolidation of annual physical facilities plans, the processing of annual physical facilities plan exceptions, and physical facilities training and evaluation.

Area Presidency

The Area Presidency is responsible to recommend to the Presiding Bishopric the area's annual physical facilities plan. Working with the director for temporal affairs, the Area Presidency also monitors the area's

progress in accomplishing the approved plan. The Area Presidency submits any exceptions to the approved annual plan to the Presiding Bishopric for appropriate consideration and processing.

Director for Temporal Affairs

Unless the Presiding Bishopric or the First Presidency specifically designates otherwise the director for temporal affairs is responsible for the acquisition and disposition of real estate; the design and construction of new facilities; and the maintenance, repair, and cleaning of existing facilities. The director for temporal affairs serves as the chairman of the area physical facilities committee, and oversees the maintenance of all official Church documents related to real estate and facilities in the area, such as contracts, deeds, as-built drawings, and site plans. These records should be retained according to established Church policies and legal requirements identified by the area legal counsel.

Sharing of Facilities

Church facilities are generally intended to be used for a variety of Church purposes. To help conserve Church funds, members and units should use each facility to its maximum capacity. This often requires that different organizations share the same facility.

Contracts and Controls

With assistance from the area legal counsel, the director for temporal affairs ensures that all contracts are legally binding and enforceable, and that those signing contracts on behalf of the Church have the appropriate certificate allowing them to legally bind the Church. All parties should comply with the terms and conditions of properly executed contracts. Deeds to real estate should be accurately completed and titles to purchased property properly conveyed.

Annual Meetinghouse Plan

The Area Presidency, with the assistance of the director for temporal affairs, prepares an annual meetinghouse plan. The plan includes the Area Presidency's recommendations for:

Real estate to be purchased for meetinghouses.

Meetinghouses to be designed and constructed.

Additions to meetinghouses.

Improvements needed to existing meetinghouses.

Items that need to be replaced in existing meetinghouses.

Repairs and cleaning.

Preparing the Annual Meetinghouse Plan

Under the direction of the Area Presidency, the director for temporal affairs is responsible for the preparation of the annual meetinghouse plan. Meetinghouse projects may be included in the plan when they meet the following qualification criteria:

Utilization and proximity: Before the area requests new facilities in a stake, members in the stake should use available meetinghouse space in the stake and in adjoining stakes if the required travel time is reasonable.

Attendance: Sacrament meeting attendance in the ward should meet the requirement for the size of meetinghouse being requested.

Tithing faithfulness: The ward should have the required number of full-tithe paying adults.

Final Approval and Funding of the Annual Meetinghouse Plan

The Presiding Bishopric consolidates annual meetinghouse plans from all areas into a worldwide meetinghouse plan, which they submit to the Council on the Disposition of the Tithes for approval. This council determines an initial funding level for each area's plan.

The Budget and Appropriations Committee appropriates the approved funds for the annual meetinghouse plan, either partially or fully. When a plan is partially funded, the area should first complete the funded portion of the plan. The Area Presidency may then ask for additional funding to cover the remaining work in the plan. This funding is approved based on qualification, need, the availability of funds, and the area's capacity to complete the work.

Tracking and Reporting the Performance of the Annual Meetinghouse Plan

The approved annual meetinghouse plan represents the area's performance commitment for physical facilities for the year. All work in the plan, as long as it still qualifies and is still needed, should be completed as represented in the plan. Each month the director for temporal affairs reports the progress of the area's annual plan to the Area Presidency. He also gives this report quarterly to the Presiding Bishopric.

Changes and Exceptions to the Annual Meetinghouse Plan

When there is a need to make changes to an approved annual meetinghouse plan, the director for temporal affairs is responsible to ensure that the changes are in accordance with the annual plan boundaries provided by the Presiding Bishopric. These boundaries identify which plan changes the area is allowed to make and which changes must first be submitted to the Presiding Bishopric as an exception request.

Acquisition of Real Estate

Meetinghouses

When a unit needs a meetinghouse, the Church may purchase or lease an existing facility and remodel it, or construct a new one. The director for temporal affairs, in consultation with the Area Presidency, determines which of these options is best for the conditions and circumstances in the area, taking into consideration the unit's attendance, stability, growth, and size; the availability and cost of land; the availability of existing facilities; and the cost to rent or purchase an existing facility.

Properties for meetinghouse sites or for additions to existing meetinghouses are purchased according to the approved annual meetinghouse plan. Once acceptable options for the site have been identified, the director for temporal affairs generally directs area personnel to purchase the site with the lowest total cost, including the cost of the land and the projected construction costs. The site should be purchased reasonably close to the time that construction is scheduled to begin, taking into account availability of the site.

Seminaries and Institutes

With help from the director for temporal affairs, area

CES personnel complete the annual CES facilities plan and return it to CES at Church headquarters, where it is consolidated for each area and presented to the Budget and Appropriations Committee for funding.

When the approved plan requires that real estate sites be purchased, CES personnel at headquarters ask the director for temporal affairs in the area to purchase the site. The director for temporal affairs sees that the same process is followed to purchase real estate for CES purposes as is used when purchasing real estate for other Church purposes.

Family History Centers

Generally, when a family history center is needed, it is placed in a stake center. If an area needs to build a stand-alone family history center on a separate property, the Area Presidency, with help from the director for temporal affairs, should submit an exception request.

Temples

The Temple Sites Committee, which is chaired by the President of the Church, directs the purchase of all temple sites. The committee determines the locations of temples and gives final approval for sites to be purchased. They are purchased by the Physical Facilities Department as directed by the Temple Sites Committee, with assistance from the director for temporal affairs and Area Presidency as requested.

The purchase of future temple sites must be kept confidential until the Temple Sites Committee directs an announcement that a temple is to be built.

Mission Homes and Offices

Once the Budget and Appropriations Committee gives approval to organize a new mission, the director for temporal affairs oversees the search for a suitable mission home and office. As directed by the Missionary Department or the Area Presidency, the director for temporal affairs may search for replacement facilities in an existing mission. In either case, the director for temporal affairs ensures that the guidelines and standards provided by the Missionary Department are followed regarding property size, location, style, and so on. When the director for temporal affairs and the Area Presidency agree on the most appropriate facility, they request to purchase or lease it. The request is reviewed

by appropriate departments and committees at Church headquarters and sent to the Budget and Appropriations Committee for funding.

Missionary Apartments

The mission president directs the rental of missionary apartments. The director for temporal affairs ensures that needed legal and real estate services are provided to help the mission president with rental contracts or legal disputes that may arise.

Missionary Training Centers

When a new missionary training center or an addition to an existing missionary training center is needed, a request for approval and funding is submitted by the Area Presidency and director for temporal affairs to the Budget and Appropriations Committee. The director for temporal affairs oversees the design of the new facilities locally. The Physical Facilities Department and the Missionary Department give final approval for the design. Construction is completed under the direction of the director for temporal affairs, unless otherwise directed by the Presiding Bishopric.

Administration Offices

The Presiding Bishopric is responsible for the purchase, design, construction, and remodeling of administration offices. Directors for temporal affairs assist them in this responsibility.

The director for temporal affairs ensures that physical facilities personnel clean and maintain the administration office according to standards established by the Presiding Bishopric.

Recreation Camp Properties

The Church purchases recreation camp properties primarily for use by stake and ward youth organizations. The Budget and Appropriations Committee approves and provides initial funding to purchase the property, along with a major portion of the funds needed to develop the property. To help in the development of the property, local units donate funds from their budget allowance, along with time, labor, materials, and equipment. The stakes that participate in the camp are responsible for ongoing funding to operate and maintain the camp after it is developed. These funds

are generated through use fees or through the local unit budget allowance of participating stakes.

Welfare Properties and Facilities

As needed, the Area Presidency, with help from the director for temporal affairs, may request approval from the Presiding Bishopric to purchase properties to accommodate welfare operations in the area. After the Budget and Appropriations Committee funds the request, the director for temporal affairs works with the Area Presidency, the Presiding Bishopric, and departments at Church headquarters to acquire the property.

Disposing of Church-Owned Properties

When it becomes necessary to dispose of all or part of any Church-owned properties, the Area Presidency and the director for temporal affairs present a recommendation to the Presiding Bishopric for consideration by the Budget and Appropriations Committee.

Design and Construction of Church Facilities

The director for temporal affairs oversees design and construction services for all Church facilities in the area unless the Presiding Bishopric or the First Presidency directs otherwise.

Design of Meetinghouses

The Budget and Appropriations Committee has issued the following policy statement regarding meetinghouse standard plans:

“Meetinghouse standard plans are approved by the Church [Budget and] Appropriations Committee. A meetinghouse is to portray an image of dignity and reverence while providing adequate facilities for Church members worldwide to participate in approved programs. Plan specifications and operating procedures necessary to support standard plans are produced under the direction and approval of the Presiding Bishopric and the [Physical Facilities] Department. Standard plan buildings are to be constructed without unnecessary alteration. If, under exceptional circumstances, local

conditions dictate modification, every effort should be made to adhere as closely as possible to the intent of the original standard plan.”

Area Standard Plans

Using approved meetinghouse standard plans the director for temporal affairs and the Area Presidency develop an area standard plan list for Presiding Bishopric approval. Meetinghouses may be constructed in the area when they are approved in the annual meetinghouse plan and are included on the approved area standard plan list.

Size of Meetinghouses

Meetinghouses are designed with different sizes of chapels and different numbers and sizes of classrooms to accommodate various sizes of congregations. Meetinghouses are also designed so that they can be added to easily as attendance increases. A unit must meet a specific level of sacrament meeting attendance over a sustained period to qualify for a particular size of meetinghouse according to the approved qualification criteria.

Design of Additions to Existing Meetinghouses

Additions to existing meetinghouses should use approved designs. One exception is in older meetinghouses, which do not need to be remodeled to match the design of newer meetinghouses. Where possible and practical, an image of dignity and reverence appropriate for the community should be preserved. Proposed additions should meet qualification criteria and be approved and funded as part of the annual meetinghouse plan.

Design and Construction of Temples

The Temple Sites Committee directs the design and construction of all new temples, additions to temples, and major remodeling of temples. Under the direction of this committee, the Physical Facilities Department prepares designs and manages construction.

Design of Other Facilities

When an area needs a facility other than a meetinghouse or a temple, the Area Presidency and the director for temporal affairs submit a request to the

Presiding Bishopric. Once funded by the Budget and Appropriations Committee, these facilities are usually designed in the area under the supervision of the director for temporal affairs, in coordination with the Area Presidency and those personnel at Church headquarters for whom the facility is planned.

Construction of Meetinghouses

Meetinghouses may be constructed when they have been approved and funded in the annual meetinghouse plan. Construction takes place under the direction of the director for temporal affairs and according to the schedule and projected cost in the approved annual meetinghouse plan. Meetinghouses are to be constructed following approved standard-plan designs and specifications.

Construction of Other Facilities

Church facilities other than meetinghouses are constructed under the direction of the director for temporal affairs unless the Presiding Bishopric or the First Presidency directs otherwise.

Maintaining Facilities

The responsibility to care for meetinghouses rests upon local Church leaders and members, supplemented by area physical facilities personnel. The responsibility to care for other Church-owned facilities rests primarily with the director for temporal affairs.

Church Maintenance Philosophy

If facilities are properly maintained, they will not usually require significant remodeling or replacement. The Presiding Bishopric has set standards for cleaning, repairing, and replacing worn-out components in Church facilities so that the facilities will perform adequately over long periods of time.

Annual Replacements and Improvements Plan

As part of the annual meetinghouse plan, the director for temporal affairs recommends to the Area Presidency the items in each meetinghouse that need to be replaced and the meetinghouses that require improvements. The stake president or his representative helps local physical facilities personnel identify these items. The stake president signs the list signifying his agreement.

The director for temporal affairs also ensures that annual replacement and improvement items for other types of Church facilities are identified and sent to the respective departments at Church headquarters for approval.

Cleaning and Repairs

The director for temporal affairs ensures that Church facilities are cleaned in compliance with the Church's published standards for each facility type. He also ensures that repairs are made in a timely manner and that commitments in the annual meetinghouse plan are met. Individuals who are paid to clean and repair Church facilities should be contracted or hired according to employment laws and regulations.

Members' Responsibility to Care for Meetinghouses and Other Facilities

Church members, including the youth, should help clean and care for Church meetinghouses. As members do so, their reverence for the Lord's house deepens. Where possible, members should fulfill this responsibility as part of weekly events when members are already at the meetinghouse. Members may also be asked to assist with the cleaning of other Church facilities.

The Area Presidency encourages members to care for Church facilities and teaches this principle to local Church leaders. The director for temporal affairs ensures that Church leaders have access to cleaning equipment, supplies, and training as needed.

Maintaining Vacant Church Property

Vacant Church property may not be used or occupied without the permission of a member of the Presidency of the Seventy or the Area President. In some circumstances, local members may use vacant Church property temporarily for gardens. Before giving approval, the Area President confirms with the area director for temporal affairs and with Church legal counsel that such use will not impede the future use of the site for Church purposes and that it will not lead to other non-Church entitlement. Participants should bear the cost of water, fertilizer, seeds, plants, and other gardening supplies.

Security and Safety

Executive Summary

Temple Security

The First Presidency determines whether there is a need for security guards at temples.

Data Privacy

The Presiding Bishopric and the Data Privacy Office at Church headquarters protect Church information and intellectual property by establishing policies and standards for gathering and using data, sorting data, and transferring data between countries.

Evacuation

The First Presidency determines when to evacuate missionaries or other Church personnel to another country. The Area Presidency determines when to evacuate missionaries or other Church personnel to another place within the country and when to change the visibility of missionaries.

Introduction

Church security and safety policies are intended to protect General Authorities, Church members, employees, visitors, property, information, and financial resources.

In general, *security* refers to prevention and protection against loss or harm caused by aggressive acts of others, and *safety* refers to prevention and protection against loss or harm caused by accidents or natural disasters.

Presiding Bishopric

The Presiding Bishopric approves the processes for security and safety work throughout the Church and determines who will manage and operate these processes.

Managing Director

The managing director of the Church Security Department reports to the Presiding Bishopric. He is

responsible for security at Church headquarters, in the United States and Canada, and in situations that involve more than one area. He manages the Church Security Department, which has the following responsibilities:

- Providing security for members of the First Presidency and the President of the Quorum of the Twelve Apostles. As appropriate, the Church Security Department also provides security for other General Authorities.
- Establishing Church security processes and standards.
- Monitoring global security and issuing security alerts and travel warnings.
- Managing and investigating critical security incidents.
- Maintaining relationships with United States intelligence agencies and senior law enforcement personnel and diplomatic officials throughout the world.
- Performing security training and operations reviews.

As requested, the Church Security Department provides areas with consultation and assistance on security issues. This may include:

- Helping prepare the area security plan.
- Helping assess security and personal safety risks.
- Performing security reviews of facilities.
- Selecting security equipment.
- Identifying, recommending, and training senior missionary couples to serve in security-related assignments.
- Selecting area security officers or contract companies.
- Training employees.
- Assisting with area investigations of specific problems.

As needed, the Church Security Department prepares reports on security issues and on major security incidents affecting the Church. This is done in

coordination with the Area Presidency, the director for temporal affairs, and managing directors of any departments that are affected by the incidents.

Area Presidency

The Area Presidency ensures that security and safety measures followed in the area are appropriate for local laws and regulations, cultural norms, and the level of risk to Church operations. They also ensure that Church leaders understand basic security and safety policies, processes, and precautions.

Director for Temporal Affairs

To help the Area Presidency fulfill their responsibilities, the director for temporal affairs supervises security in the area. He may choose to do this personally, particularly in areas with minimal security concerns, or he may assign this task to an area manager. He can request a security missionary couple to help or, with Presiding Bishopric approval, he can hire an employee to direct the work.

The director for temporal affairs is responsible to:

- Implement preventive safety, health, and environmental programs, practices, and inspections.
- Restore, as appropriate, physical assets that are damaged in accidents or natural disasters.
- Report on claims, threats of claims, and litigation and take efforts to minimize their impact on the Church.
- Prepare for and minimize interruptions to Church operations.
- Ensure that appropriate vehicle, property, and liability insurance and employee-related health, life, medical, and disability insurance are in effect and are consistent with Church policies and standards.

Safety Risk Management

The Finance and Records Department has the following responsibilities for safety:

- Establish safety, health, and environmental processes and standards for approval.
- Provide vehicle, property, and liability insurance.

- Provide consultation as requested.
- Coordinate responses to claims, threats of claims, and litigation.
- Conduct operations reviews in the area as requested by the director for temporal affairs or as directed by the Presiding Bishopric.

Area Security Plan

In coordination with the Area Presidency and the Church Security Department, the director for temporal affairs develops the area security plan. It includes an emergency action plan, an evacuation plan for missionaries, and an emergency contact list.

The director for temporal affairs and the Area Presidency review the plan periodically to ensure that it is current and is being implemented properly.

Emergency Action Plan

The area security plan includes an emergency action plan for the administration office and for each mission office in the area. The emergency action plan may include plans for communicating information or instructions and plans for alternative office space and computers to maintain business continuity in the event of disruptions.

Evacuation Plan for Missionaries

The decision to evacuate missionaries or other Church personnel to another country is made by the First Presidency, in consultation with the Area Presidency, the Missionary Department, and any departments at Church headquarters that would be affected by the evacuation.

The decision to evacuate missionaries or other Church personnel to another place within the country is made by the Area Presidency, in consultation with the Missionary Department and other departments at Church headquarters affected by the evacuation. This is also true of the decision to change the visibility of missionaries (for example, by keeping them indoors, requiring that they not wear name tags, and so on). In all cases, the director for temporal affairs keeps the Presiding Bishopric informed.

The Area Presidency ensures that the mission

presidents in the area prepare an evacuation plan for missionaries and mission presidents' families. The director for temporal affairs should be familiar with these plans and help with their development as needed.

Emergency Contact List

The emergency contact list includes contact information for:

- Government, military, law enforcement, and emergency response personnel.
- Embassies.
- Any security monitoring company contracted by the area.
- Key contacts at Church headquarters, such as the Presiding Bishopric, the Church Security Department, Welfare Services, and the Missionary Department.
- Key contacts in the area, such as the Area Presidency, Area Seventies, the director for temporal affairs, and critical area personnel.

Security Risk Assessment

The director for temporal affairs conducts an annual assessment of security risks facing area personnel and facilities, and shares the results of the assessment with the Area Presidency.

Area Security Operations Reviews

As assigned by the Presiding Bishopric, the Church Security Department conducts area security operations reviews. The frequency of these reviews is based, in part, on the level of security risk in a country or area. Operations reviews may also be requested by the director for temporal affairs, or Area Presidency, or occur in response to a specific need or incident.

In connection with these operations reviews, the Church Security Department may provide other security services as requested by the director for temporal affairs, such as security training and facility security assessments.

Personal Security

The director for temporal affairs assists the Area

Presidency in their responsibility for the security of missionaries, Church employees, visitors to Church facilities, and Church leaders while they are performing their ecclesiastical duties or participating in meetings. The director for temporal affairs also ensures the safety of area facilities.

Members of the Area Presidency and Expatriates

The director for temporal affairs works with the Presiding Bishopric to identify, acquire, and furnish secure housing as appropriate for members of Area Presidencies and expatriate employees.

Visiting General Authorities and General Auxiliary Leaders

Church Security Department officers accompany visiting General Authorities when assigned by the First Presidency or if there is significant risk in traveling to a particular country or region. When Church Security Department officers travel with a General Authority, they coordinate security measures for him with the Area Presidency and the director for temporal affairs. When a visiting General Authority is not accompanied by Church Security Department officers, the Area Presidency is responsible for his security, assisted by the director for temporal affairs.

The Area Presidency, assisted by the director for temporal affairs, is also responsible for the security of members of general auxiliary presidencies or boards who visit the area.

Church Employees

Church employees traveling in the area should notify the director for temporal affairs of their travel plans and may request security information from him.

Safety of Missionaries

The Area Presidency and the mission presidents in the area ensure that missionary living quarters are appropriate and safe. They also ensure that automotive safety is taught to all missionaries who use Church vehicles.

For more information, see the *Mission President's Handbook*, pages 30–36.

Security of Facilities

The director for temporal affairs ensures that Church-owned and Church-leased facilities meet security standards that are appropriate for the location and purposes of the facilities. This includes proper lighting, locks, perimeter security, emergency communications, use of security guards, access control, cameras and alarms, and cash management. In addition, the director for temporal affairs ensures that administration office personnel are trained to watch for unusual situations and unfamiliar individuals.

Security features on Church facilities should be unobtrusive and inconspicuous so that they do not detract from the mission of the Church. Even when security features need to be aggressive, the Area Presidency and the director for temporal affairs make sure that security needs are carefully balanced with the need to preserve the Church's image.

Cash in Church Facilities

Whenever possible, cash should not be kept in Church facilities.

Meetinghouses

Stake presidents are responsible for control of physical access to meetinghouses. This includes authorizing and controlling meetinghouse keys. The director for temporal affairs can help stake presidents with key distribution and control procedures. Bishops are responsible for securing meetinghouses.

Where necessary because of local security concerns, the director for temporal affairs may implement enhanced security measures.

Mission Facilities

The mission president has primary responsibility for the security of the mission office, mission home, and missionary training center. The director for temporal affairs may provide assistance.

Temples

Because of the sacredness of temple ordinances, the security of temples is maintained at the highest level. Most temples are protected by a wall or fence that helps

deter would-be intruders.

The director for temporal affairs, in consultation with the temple presidency, is responsible for providing security at smaller temples.

The Temple Department and the Church Security Department provide security at larger temples. These departments work with the director for temporal affairs to coordinate the temple's security practices with other security practices in the area (such as security officer training, approval of security equipment, physical security features, and access controls). Where a larger temple is adjacent to an administration office or other Church facility, security may be assigned to the director for temporal affairs.

For all temples, the First Presidency determines whether there is a need for security guards. Typically, security guards are authorized only in selected larger temples and in smaller temples in countries with a particularly high security risk. When guard stations are needed, they should be located at the entrance points to the temple grounds.

Endowed, set-apart priesthood holders at the recommend desk monitor access to the temple. Temple engineering staff may assist in providing extended security coverage. After-hours patrolling of the property by security personnel should be professional but not intrusive. Apprehension or detention of those trying to cause mischief is coordinated with local law enforcement personnel.

Employee Identification Cards or Badges

Requiring employees to carry identification cards or badges can make it easier to identify visitors to facilities who are not employees. These cards can also be used as electronic access control devices, which allow security personnel to restrict access and to monitor who is in a facility.

The Area Presidency and the director for temporal affairs decide whether or not to use identification cards and access control cards. They base this decision on the size of the office staff, the maturity of technology in the area, and the history or threat of unauthorized entry into the facilities.

Compatibility of Electronic Security Systems

Before buying and installing electronic security systems, such as cameras, alarms, access systems, or radio networks, the director for temporal affairs coordinates with the Church Security Department and the Information and Communications Systems Department to make sure the systems are compatible with the worldwide Church security network and the Church technology infrastructure. The director for temporal affairs consults with the Physical Facilities Department when new facilities are being planned in order to incorporate security features in the facility designs.

Security Guards

The Area Presidency and director for temporal affairs decide whether or not to use security guards at administrative facilities or meetinghouses. Security personnel may be either hired or contracted depending on local laws and circumstances. Hiring additional employees requires review and approval by the Presiding Bishopric.

Security personnel hired as employees should be temple-worthy members of the Church. If qualified Church members are not available, those hired should follow Church standards while on the job.

If an appropriately trained security company is available in the area, the area may contract with this company. The Area Presidency, with help from the director for temporal affairs, retains overall responsibility for security.

In considering whether security guards at sites other than temples will carry weapons, the Area Presidency, the director for temporal affairs, and the Church Security Department take into account locally accepted practice, the history of violent incidents in the area, advice from the United States embassy (if applicable), and advice from local police and local security contractors. They then make a recommendation to the Presiding Bishopric.

Security of Information

Directors for temporal affairs and managing directors are responsible for safeguarding personal, financial, and other sensitive or confidential information in the possession of the Church. This includes ensuring that

Church leaders, employees, missionaries, and other members adhere to the following security measures:

- Computers are protected by appropriate passwords that are changed regularly and are treated as sensitive information.
- Key databases are backed up regularly.
- Computers, backup devices, printouts, and data storage media are kept in locked rooms, closets, drawers, or cabinets; key control is documented.
- Access to confidential information is limited and audited regularly.

Data Privacy

The Presiding Bishopric and the Data Privacy Office at Church headquarters establish policies and standards to protect Church information and intellectual property. They also set standards for gathering and using data, storing data, and transferring data between countries. All requests for personal information from regulatory agencies or officers should be immediately referred to the Data Privacy Office or to membership personnel in the Finance and Records Department.

As requested, the Church Security Department, the Data Privacy Office, and other personnel at Church headquarters can provide area personnel with technical advice to help establish and monitor security procedures and facilities.

Incident Reporting

Critical Security Incidents

The Church Security Department is responsible for the management and investigation of critical security incidents including:

- Threatened or actual assault, kidnapping, murder, or serious injury of Church leaders, missionaries, or employees or their dependents.
- Serious civil disorder or criminal or terrorist threats or acts, such as extortion, arson, or bombing, that threaten or harm Church facilities or personnel.

The Area Presidency, director for temporal affairs, and managing directors ensure that such incidents are

immediately reported to the assigned member of the Quorum of the Twelve, the Presiding Bishopric, and the Church Security Department. In the event of a kidnapping or extortion attempt, Church personnel should avoid making agreements or providing information to those making payment demands. Any communication with the criminals before contacting the Church Security Department should be limited to obtaining information.

Other Incidents

The director for temporal affairs assigns area staff to respond to pandemics, natural disasters, and security incidents such as burglaries, armed robberies, and medical emergencies. Such incidents are reported to the Church Security Department and to any departments at Church headquarters that are affected by the incidents.

Minor or routine security incidents are reported via the Global Incident Reporting System to the Church Security Department.

Relationships with Non-Church Entities

The director for temporal affairs ensures that working relationships are established with local emergency-response personnel, local security companies, local and federal government officials, and others who may help the Church resolve security matters. A contact list is maintained as part of the area security plan.

The director for temporal affairs designates a person to represent the Church and the area on the United States embassy country council in nations where it is organized.

Training

Directors for temporal affairs and managing directors ensure that employees, contractors, and volunteers who participate in Church operations such as facilities maintenance, construction, or welfare operations are provided training appropriate to their involvement and exposure to risk. They further ensure that equipment and facilities are maintained in a manner consistent with local laws and regulations and with approved Church standards to prevent damage or injury.

Employees

With the exception of security at a few larger temples and some Church Educational System facilities, security training is the responsibility of the director for temporal affairs. He trains employees performing security functions to a level that meets approved security standards.

As requested by the director for temporal affairs, the Church Security Department provides:

- Training to newly-hired security staff.
- Training and annual certification of security staff in fire response and safety, CPR, first aid, bomb-search techniques, procedures for dealing with hazardous materials, and so on.
- Training for selected members of the security staff so that they can help the director for temporal affairs conduct training and skills recertification.
- Advanced security training at Church headquarters for area security managers and country security supervisors.
- Security and safety training for non-security Church employees.

Local Church Leaders

The Area Presidency should work to improve safety in the area by increasing Church leaders' awareness of safety issues.

The Area Presidency, with help from the director for temporal affairs, makes sure that local leaders understand and follow safety precautions relating to:

- Calling people to teach or work with youth and children.
- Abuse.
- Church activities, including overnight activities and those that involve travel.
- Safety in the use of meetinghouses, other Church facilities, and equipment.

For more information, see *Church Handbook of Instructions, Book 1*, pages 45, 147, 164–65, 186, and

will permit the Church to function at acceptable levels in such circumstances. As requested, the Finance and Records Department can provide consultation.

Claims and Litigation

The Office of General Counsel and the Finance and Records Department manage claims and litigation against the Church. Outside the United States and Canada, all claims, threats of claims, or actual litigation are reported to the area legal counsel; in the United States and Canada, they are reported directly to the Finance and Records Department.

Insurance

Vehicle, Property, and Liability Insurance

The Finance and Records Department provides vehicle, property, and liability insurance and pays all premiums. Where local law requires that insurance be purchased in the country, the Finance and Records Department specifies to the director for temporal affairs what insurance coverage should be obtained and provides funds to pay premiums.

Any accident or damage to a Church-owned vehicle should be reported immediately to an insurance adjustor, whose contact information should be in all Church-owned vehicles.

If a facility is damaged, the director for temporal affairs reports the incident, works to obtain budget adjustments to offset the costs of repairs, and as appropriate, restores the facility to the condition it was in before the accident.

Insurance for Employees

The Human Resource Department provides health, life, accident, and disability insurance for Church employees, according to the approved benefit levels for each country. Where local law requires insurance to be purchased locally, the Human Resource Department specifies to the director for temporal affairs what insurance coverage should be obtained.

Business Continuity Planning

Directors for temporal affairs and managing directors identify key business processes that must continue to function in spite of disruptions. They develop, implement, and periodically test continuity plans that

Information and Communication

Executive Summary

Use of Technology

The Church provides technology and communications resources and encourages their use in accomplishing the work of the Church. Leaders and employees ensure that the use of these resources is consistent with the sacred nature of the Church's work and mission.

Technology Governance and Implementation

The Presiding Bishopric oversees the Church's global information technology, communications resources, and policy. The Information and Communication Services (ICS) Department at Church headquarters is responsible for determining what these resources will be and implementing them. Church leaders and managers should contact the ICS Department for guidance, assistance, and service.

Software

The ICS Department approves the development, purchase, and acquisition of computer software. Use of all software on Church computers must meet licensing requirements.

Networks

The ICS Department is responsible for the Church network—including Internet and wireless access—between and within Church administrative offices and all other facilities, such as area offices, service centers, meetinghouses, missions, and temples. All connections to the Internet and other external networks are coordinated with the ICS Department.

Internet Access

Internet access is typically provided at Church facilities, including administrative offices and meetinghouses. Leaders and managers ensure that it is used properly and wisely. Wherever possible, Internet use at Church facilities is filtered, logged, and monitored by the ICS Department. Those using Church technology should have no expectation of privacy. The ICS

Department reports potential Internet abuse to the organization's leader for follow-up.

Church Websites

Public-facing websites may be used by Church administrative, ecclesiastical, and other organizations when authorized by policy. All Church websites are established and coordinated by the Presiding Bishopric through the ICS Department.

Information Security

Church leaders and managers take appropriate measures to protect confidential information wherever it is located. They ensure that Church computers and other systems are safeguarded from inappropriate access and use and that Church systems comply with Church policy, data-protection laws, and privacy laws. If Church systems or confidential information is compromised, this should be reported immediately to the Global Service Center, at 1-801-240-4357.

Additional Information

Additional information about Church information technology can be found on the Church intranet. For specific guidelines related to the use of technology in meetinghouses, go to <http://mhtech.lds.org>, or see *Handbook 2: Administering the Church* (2010), 21.1.11, 21.1.22.

Introduction

Advances in technology are a blessing from the Lord. They help the gospel “go forth . . . into all the world, and unto the uttermost parts of the earth” (D&C 58:64). The Church encourages leaders and managers to use technology to further the purposes of the Lord.

The First Presidency, Quorum of the Twelve, and the Presiding Bishopric direct and govern technology and communications systems for the Church. They determine how, where, and when technology and communications resources are used.

The Information and Communication Services (ICS) Department at Church headquarters, under the direction

of the Presiding Bishopric, determines what information technology and communications resources will be used in the Church and is responsible for implementing those resources.

Church managers and leaders, guided by Church policy, apply approved technology to fulfill the mission of the Church. Area and department managers and leaders work closely with the ICS Department, which provides guidance and service to help them achieve their organization's objectives.

The ICS Department helps departments, areas, and local units improve the effectiveness, efficiency, quality, consistency, expertise, security, and compliance of their use of technology. By using the ICS Department's services, Church organizations reduce costs (through economies of scale), standardize processes (through centralization), and are able to focus on core activities that achieve the ultimate aims of the Church.

Roles and Responsibilities

Presiding Bishopric

As part of its role to govern temporal affairs of the Church, the Presiding Bishopric has the responsibility for providing technology and communications systems in the Church. The Presiding Bishopric supervises and directs the ICS Department, which is responsible for implementing and supporting technology and communications systems for the Church worldwide.

Information and Communication Services Department

The ICS Department at Church headquarters supports technology and communications systems throughout the Church.

At Church headquarters, information and communication resources used by Church departments are provided and supported through ICS portfolios. ICS portfolios are aligned by headquarters departments or business processes. A portfolio working group establishes work and project priorities and allocates approved funds. Each working group consists of department leaders and an ICS portfolio director.

The ICS Department establishes technology policy

and related standards. Departments at Church headquarters and directors for temporal affairs implement these policies and standards at meetinghouses and other facilities for which they are responsible.

The ICS Department is also responsible for the Church's worldwide technology and communications infrastructure, including the Church computer network, global satellite system, enterprise e-mail, Church websites, communication tools, and so on.

Area Presidency (Outside the U.S. and Canada)

Outside the United States and Canada, the Area Presidency uses approved technologies to further the work of the Church in the area. The Area Presidency also ensures that Church leaders follow policies when using technology and communications systems (policies for stakes and wards are found in *Handbook 1: Stake Presidents and Bishops* [2010], 17.1.12; and *Handbook 2: Administering the Church* [2010], 21.1.22). The Area Presidency helps plan and monitor the area's budget and expenses for technology and communications systems. The director for temporal affairs assists the Area Presidency in these responsibilities. Departments at Church headquarters are generally responsible for these duties in the United States and Canada

Director for Temporal Affairs (Outside the U.S. and Canada)

Outside the United States and Canada, the director for temporal affairs works with the Area Presidency, the ICS Department, and the area ICS manager to implement approved technologies in the area. Church headquarters determines what technology resources will be used to support the work throughout the world. Departments at Church headquarters are generally responsible for implementing approved technologies in the United States and Canada

Area ICS Managers (Outside the U.S. and Canada)

Outside the United States and Canada, the area ICS manager, under the direction of the director for temporal affairs, ensures that technology and communications needs in the area (including those in

administrative offices, missions, and other Church business locations) are understood and fulfilled by providing standard support services for approved technologies and customers as defined in the Area ICS Support Model. Any deviation from the approved standards should be approved by ICS and be made with consideration to the impact on area ICS staff, cost, and service. He or she maintains a thorough working knowledge of approved Church technologies and makes sure these are successfully implemented and supported throughout the area.

In addition to supervising the area ICS staff, the area ICS manager gives training, support, and guidance to technology staff in other Church organizations in the area. He or she works closely with area leaders and other managers to understand requirements and needs and communicates these to the ICS Department at Church headquarters.

The area ICS manager develops periodic team and technology goals and detailed plans to accomplish those goals. He or she also develops and manages the area ICS budget and monitors and approves related expenditures. Working with the area legal counsel, the ICS Department's IT Security Office, and the Church Privacy Office, the area ICS manager ensures that Church staff understand and fulfill legal and due care requirements. He or she ensures that confidential information is protected and technology systems are safeguarded in accordance with Church IT standards. If Church systems or confidential information is compromised, the area ICS manager immediately informs the Global Service Center, at 1-801-240-4357. The area ICS manager assists Church staff in understanding and using technology and conducts regular technology presentations and training.

Under the direction of the area ICS manager, the area ICS staff support applications provided by the ICS Department, including country websites and area intranet portals. They also administer local area networks, ensuring that they are properly integrated with the Church global network; implement and support approved satellite systems, workstations, laptops, phones, videoconferencing systems, and other approved technologies; perform routine preventive maintenance on hardware and software; maintain an inventory of technology assets, which should include

information about procurement, disposition, location, and disposal of these assets; ensure compliance with software licensing agreements; maintain a centralized log of software use; maintain technology documents and certificates, such as product registrations, maintenance agreements, and service contracts; and prepare, maintain, and test an area technology disaster recovery plan.

As needed, the area ICS manager works with facilities managers and other Church departments to fulfill these responsibilities.

Technology in Local Church Units and Facilities

Roles and Responsibilities

Policy Source and References

The roles and responsibilities for meetinghouse technology, as defined in this document, have been reviewed and approved by the Meetinghouse Technology Committee, the Information and Communication Services Policy Committee, the Meetinghouse Facilities Department, and the Presiding Bishopric. Inquiries concerning this policy should be directed to the Meetinghouse Technology Coordination Team in the Information and Communication Services Department at Church headquarters.

See also *Handbook 1: Stake Presidents and Bishops*, 13.2, 13.3, 14.7.2, 17.1, and *Handbook 2: Administering the Church*, 17.2, 18.3, 21.1, 21.2.

See also "Meetinghouse Technology Policy" at mhtech.lds.org.

Scope

Worldwide: The roles and responsibilities for meetinghouse technology defined in this document apply worldwide unless otherwise stated.

Callings: Where ward and stake callings are referred to, the same roles and responsibilities also apply to the equivalent branch and district callings.

Definitions and Acronyms

Area Information and Communication Services (Area

ICS): Church employees outside the U.S. and Canada that provide technical support to the Church workforce.

Facilities Management Group (FM Group): A group of Church employees, led by a facilities manager (FM), which manages multiple meetinghouses, usually spread across several stakes. It works primarily with stake presidents and physical facilities representatives to maintain Church buildings and properties.

Global Service Center (GSC): Support group available to assist stake technology specialists with meetinghouse technology items that they cannot solve on their own and that are not the responsibility of the FM.

Information and Communication Services Department (ICS): Church department charged with providing technology services for the Church worldwide.

Internet Service Provider (ISP): A company that provides access to the Internet.

Meetinghouse Computer: Any computer purchased with Church funds for use in a meetinghouse, installed under the direction of the stake presidency, and managed in compliance with Church standards. Meetinghouse computers include clerk computers and others used for gospel-related purposes.

Meetinghouse Technology Committee: A committee at Church headquarters representing all major departments of the Church that influence technology in meetinghouses.

Meetinghouse Facilities Department (MFD): Church department charged with providing Church facilities worldwide.

Meetinghouse Technology Coordination Team: ICS employees charged with coordinating communications, training, and policy related to meetinghouse technology.

Physical Facilities Representative (PFR): A high council member assigned to coordinate building needs with the facilities manager and the stake technology specialist.

Stake Technology Specialist (STS): One or more clerks called by the stake to provide technology support for meetinghouse products, services, and policies to

priesthood leaders, teachers, official family history centers, and mission offices.

Stake Technology Specialist (STS)

1. Stays current on meetinghouse technology products, services, and policies
2. Provides technology support for meetinghouse products, services, and policies to priesthood leaders, teachers, family history centers, and mission offices
3. Manages Meetinghouse Internet
 - Ensures that an approved Meetinghouse Firewall is in place
 - Makes sure computers and devices are not bypassing the firewall
 - Troubleshoots Internet connectivity issues
4. Sets up, tests, runs, takes down, and stores audio, video, and broadcast equipment
5. Installs and supports meetinghouse computers including:
 - Setting up hardware
 - Installing standard operating system and applications
 - Assisting when meetinghouse computers are not working properly
 - Erasing hard drives before meetinghouse computers are disposed of
 - Sets up and supports meetinghouse printers and copier
6. Coordinates with FM through PFR to ensure meetinghouses have approved and working technology equipment
7. Provides input to FM through PFR on ISP selection and desired locations for wired and wireless access
8. Trains clerks, priesthood leaders, teachers, and others (as directed) on meetinghouse technology. Quarterly training meetings are recommended. Suggested training topics include:
 - Facilitating a Church broadcast via satellite, Internet, or webcast

- Understanding meetinghouse technology policy
- Learning how to play digital media for lessons and training
- Using Personal Video Conferencing (PVC)
- Registering for an LDS Account
- Promoting Church websites and software available to general Church membership

9. Maintains inventory of meetinghouse technology hardware and software including date of acquisition, warranty, and licensing information

10. Acts as primary contact for requesting help from GSC

11. Acts as primary contact for requesting technical help through Family History Center Support (Computers, computer screens, printers, and other equipment for family history centers are provided by the Family History Department [FamilySearch] and have their own support services.)

12. Looks for additional resources that may be able to assist a stake with technology training or other technology needs

13. Does not have access to financial or membership data unless serving in an additional calling which requires it

Stake Clerk

1. Trains clerks and priesthood leaders on Church applications such as MLS and those available on LDS.org

2. Trains clerks and priesthood leaders on the proper use of membership data

3. Ensures person called as STS is accurately recorded in MLS (Assistant Stake Clerk – Technology Specialist). This makes it possible for the Meetinghouse Technology Coordination Team to communicate directly with the STS.

4. Oversees the work of assistant stake clerks, including the STS

Stake President

1. Oversees proper use of technology within a stake

2. Understands and enforces meetinghouse technology policy

3. Calls one or more STSs

4. Determines who has keys to access meetinghouse technology equipment and spaces

5. Approves budget for purchases of approved Church products not covered by the FM group

- Audiovisual equipment for webcasting and Personal Video Conferencing (PVC)

- Toner and paper

Ward Clerk

1. Backs up data files on clerk computers

2. Checks firewall compliance weekly on clerk computers

3. Ensures MLS is updated to the latest version

Physical Facilities Representative (PFR)

1. Works with STS to coordinate technology issues and needs with the FM group

2. Acts as primary stake contact for the FM group

3. Communicates requests for repairs or replacements to the FM group

4. Works with the FM on technology issues that may impact a building's structure, functionality, or aesthetics

5. At the discretion of the stake president and FM, an STS and FM may work directly together.

Facilities Manager (FM)

1. Works with stake presidents, STSs, and/or PFRs to ensure meetinghouses have approved and working technology equipment

2. In compliance with MFD standard plans:

- Approves and coordinates all physical modifications to the meetinghouse, including those that may impact a building's structure, functionality, or aesthetics

- Procures and distributes technology equipment

funded by the MFD

- Receives and distributes technology equipment purchased by the Family History Department for official family history centers
- Stays current on meetinghouse technology products and policy
- 3. For computers and other technology equipment provided during new building construction or later by the FM group:
 - Maintains an inventory of products
 - Coordinates and pays for the repair or replacement of products, as budgets allow
 - Disposes of products in accordance with Church guidelines and local laws when they are no longer needed
- 4. Selects and pays for Internet service provider
- Adheres to cost and service standards
- Receives input from stakes on which provider to use
- Works with ICS to ensure competitive pricing, assist with provisioning, and consolidate billing
- 5. Receives requests from stakes on desired locations for wired and wireless access
- 6. Outside of the U.S. and Canada, consults with Area ICS

Area Presidency

1. Considers factors such as the needs of units, the readiness of people to use technology, availability of member expertise for technical support, and the effectiveness of the technology in meeting important needs to determine which approved technologies are made available in meetinghouses
2. Considers local economic and social conditions, which often affect the availability and acceptability of reasonably priced technologies and the infrastructure to make them effective

Additional Area Presidency roles and responsibilities related to technology in general can be found under Information and Communication, Roles and

Responsibilities.

Area ICS (Outside the U.S. and Canada)

1. Consults stake technology specialists on meetinghouse technology
2. Consults FMs on Meetinghouse Internet implementations
3. Stays current on meetinghouse technology products and policy

Additional Area ICS roles and responsibilities related to technology in general can be found under Information and Communication, Roles and Responsibilities.

Global Service Center (GSC)

1. The STS may contact the GSC for help with items related to meetinghouse technology that they cannot solve on their own and that are not the responsibility of the FM group
2. If the GSC determines that a problem relates to something that the FM is responsible for, they will ask the STS to contact the FM group through the PFR
3. In cases where the GSC does not support the language spoken by an STS, the STS enlists the assistance of a translator

Meetinghouse Technology Coordination Team

1. Receives feedback from STSs and shares it with meetinghouse technology product managers
2. Coordinates and delivers meetinghouse technology communications and training for STSs
3. Coordinates and shares meetinghouse technology communications and training with:

- MFD
- Area ICS
- Meetinghouse technology product managers
- Church departments such as Missionary, Family History, and Church Education
- 4. Manages meetinghouse technology website:
<http://mhtech.lds.org>

5. Drafts, updates, and guides meetinghouse technology policy through an established approval process

Related Articles

“Meetinghouse Technology Policy”

Additional meetinghouse technology documentation and training are found at <http://mhtech.lds.org>

Meetinghouse Technology Policy

Policy Source and References

This policy has been reviewed and approved by the Meetinghouse Technology Committee, the Information and Communication Services Policy Committee, the Meetinghouse Facilities Department, and the Presiding Bishopric. Inquiries concerning this policy should be directed to the Meetinghouse Technology Coordination Team in the Information and Communication Services Department at Church headquarters.

See also *Handbook 1: Stake Presidents and Bishops*, 13.2, 13.3, 14.7.2, 17.1, and *Handbook 2: Administering the Church*, 17.2, 18.3, 21.1, 21.2.

See also “Meetinghouse Technology Roles and Responsibilities” at mhtech.lds.org.

Scope

Worldwide: The meetinghouse technology policies defined in this document apply to all meetinghouses worldwide unless otherwise stated.

Callings: Where ward and stake callings are referred to, the same roles and responsibilities also apply to the equivalent branch and district callings.

Definitions and Acronyms

Facilities Management Group (FM Group): A group of Church employees, led by a facilities manager (FM), that manages multiple meetinghouses, usually spread across several stakes. It works primarily with stake presidents and physical facilities representatives to maintain Church buildings and properties.

Information and Communication Services Department (ICS): Church department charged with providing technology services for the Church

worldwide.

Internet Service Provider (ISP): A company that provides access to the Internet.

Meetinghouse Computer: Any computer purchased with Church funds for use in a meetinghouse, installed under the direction of the stake presidency, and managed in compliance with Church standards. Meetinghouse computers include clerk computers and others used for gospel-related purposes.

Meetinghouse Facilities Department (MFD): Church department charged with providing Church facilities worldwide.

Meetinghouse Technology Committee: A committee at Church headquarters representing all major departments of the Church that influence technology in meetinghouses.

Meetinghouse Technology Coordination Team: ICS employees charged with coordinating communications, training, and policy related to meetinghouse technology.

Member Leader Services (MLS): Software on clerk computers used to manage membership and unit finance and member donation information and to run reports. Similar functionality is becoming available on LDS.org.

Physical Facilities Representative (PFR): A high council member assigned to coordinate building needs with the facilities manager and the stake technology specialist.

Stake Technology Specialist (STS): One or more clerks called by the stake to provide technology support for meetinghouse products, services, and policies to priesthood leaders, teachers, official family history centers, and mission offices

Third Party Software: Any computer software program that was not created by the Church or is not approved for use on Church computers.

Computers

Computer equipment may include, but is not limited to, desktops, laptops, computer screens, keyboards, and mice.

Funding

1. **New Building Construction:** Computers, computer screens, printers and copiers included in new building construction as part of a meetinghouse standard plan are paid for out of construction project funds. Thereafter, they are repaired, upgraded, and replaced by the FM group in compliance with MFD standard plans.
2. **FM Provided Equipment:** FM groups may provide additional computers, computer screens, and printers, as directed by MFD. The costs for maintaining, upgrading, and replacing this equipment, in compliance with MFD standard plans, are the responsibility of the FM group.
3. **Local Unit Provided Equipment:** Local unit budgets cannot be used to purchase computers (*Handbook 1: Administering the Church*, 14.7.2). Exceptions to this can be made under the direction of stake presidents in the case of webcasting (see section 7). The costs for repairing, upgrading, and replacing any equipment not provided as part of new building construction or by the FM group are the responsibility of the local unit.

Inventory

1. FM groups keep an inventory of all computer equipment included in new building construction or provided later by FM groups.
2. Local units keep an inventory of any computer equipment purchased in exceptional circumstances with local unit funds.

LDS Account passwords and passwords used to access MLS must not be shared.

Appropriate Use

1. Computers with MLS installed must be used only for authorized gospel-related purposes as approved by the stake president.
2. Ward and stake clerks have priority use of computers with MLS installed.
3. Non-clerk Church computers should be used only for gospel-related purposes. Some examples of gospel-

related purposes include lesson preparation, missionary work, family history work, seminaries and institutes of religion, and employment resources.

4. There should be no expectation of privacy regarding the use of Church computers.

Donated Computers

1. Donated computers may not be added to official family history centers.
2. MLS may not be installed on donated computers.

MLS Software

1. Installing MLS software on home computers is prohibited.
2. Tampering with MLS source code is prohibited.

Date and time system settings must not be altered on computers when MLS is open.

MLS Data and Membership Information

1. Information about members, donations, and financial transactions is confidential and must be protected from unauthorized disclosure.
2. MLS data, database tables, or schemas must not be used or shared to create or assist in the creation of third party software.
3. The use of MLS data and membership information in third party software is prohibited, whether obtained from within or outside of a meetinghouse.
4. The use of cloud-based services for storing and/or backing up MLS or any membership related data is prohibited.

Remote access of Church computers is expressly prohibited except in cases where all of the following are true:

1. When done by official Church support personnel or under the direction of a stake president by a stake technology specialist, stake clerk, or member of a stake presidency.
2. When used to ensure a Church computer is functioning properly or to help someone use the system.

3. When not used to enter data into MLS and not used to access sensitive information.
4. When the software used is properly licensed.
5. When the software is set up to utilize standards-based encryption (AES-128 or better).

Retiring Computers

1. Before any Church computer is retired from service, its hard drive must be completely erased.

Sharing clerk computers between wards or stakes is permitted with stake president approval.

Software

1. Each ward or stake authorized to use MLS must ensure it is using the latest version of the software.
2. Only Church-approved, licensed software is permitted for installation on Church computers.
3. Church-provided desktop management and desktop security must be installed on all Church computers.

Surge Protectors and Uninterruptible Power Supplies (UPSs)

1. Church-owned computer equipment must be protected with surge protectors.
2. Surge protectors are to be paid for using FM budgets.
3. FMs determine if a UPS is required in exceptional circumstances. FMs may consult with ICS to determine if there is a need. Where required, FMs purchase and install UPSs.

Theft and vandalism must be reported to the FM group immediately.

Printers, Copiers, and Multi-Function Devices

Funding

1. **New Building Construction:** Printers, copiers, and multi-function devices included in new building construction as part of a meetinghouse standard plan are paid for out of construction project funds. Thereafter, they are repaired, upgraded, and replaced by the FM group in compliance with MFD standard plans.

2. **FM Provided Equipment:** FM groups may provide additional printers, copiers, and multi-function devices, as directed by MFD. The costs for maintaining, upgrading, and replacing this equipment, in compliance with MFD standard plans, are the responsibility of the FM group.

3. **Local Unit Provided Equipment:** Local unit budgets should not be used to purchase any printers, copiers, and multi-function devices. The costs for repairing, upgrading, and replacing any equipment not provided as part of new building construction or by the FM group are the responsibility of the local unit.

4. **Paper and other consumables** are purchased using ward and stake budgets.

Inventory

1. FM groups keep an inventory of all printers, copiers, and multi-function devices included in new building construction or provided later by FM groups.
2. Local units keep an inventory of any printers, copiers, and multi-function devices purchased in exceptional circumstances with local unit funds.

Surge Protectors and Uninterruptible Power Supplies (UPSs)

1. Church-owned computer equipment must be protected with surge protectors.
2. Surge protectors are to be paid for using FM budgets.
3. FMs determine if a UPS is required in exceptional circumstances. FMs may consult with ICS to determine if there is a need. Where required, FMs purchase and install UPSs.

Retiring Printers, Copiers, and Multi-Function Devices

1. If any printer, copier, or multi-function device containing a hard drive or other storage is retired from service, its hard drive must be completely erased.

Theft and vandalism must be reported to the FM group immediately.

Meetinghouse Internet

The components of Meetinghouse Internet include the ISP, the Meetinghouse Firewall, and the equipment and cabling used to extend access to areas of a meetinghouse through wired and wireless means.

Appropriate Use

1. Internet access is authorized in meetinghouses, under the direction of the stake president, for purposes that support the mission of the Church.
2. There should be no expectation of privacy regarding the use of Internet in meetinghouses.
3. If there is abuse of Internet use, stake presidents will be contacted by Church headquarters.

Firewall

1. An approved Meetinghouse Firewall configured in an approved manner and centrally managed by the Church is required in all meetinghouses with Internet access.
2. Viewing or making changes to the configuration of a Meetinghouse Firewall is prohibited.
3. All computers and other network devices connecting to Church-provided Internet must connect through the Meetinghouse Firewall. The Meetinghouse Firewall enables proper filtering of content.
4. The Meetinghouse Firewall and ISP modem must be secured behind a locked door or cabinet with limited access. Clerk and ecclesiastical offices should not be used for this purpose unless they are secured in a locked cabinet.

Network Infrastructure

1. Network jacks and wireless access points are installed under the direction of FM groups in compliance MFD standard plans, as budgets allow.

Wireless Access Points

1. All wireless access points must be connected to a Church-approved firewall.
2. Each wireless access point must be configured to require a password to connect to the meetinghouse network.

3. Each wireless access point must be configured to allow only WPA2 (preferred) or WPA.

Funding

1. High-speed Internet installation, monthly service fees, and network equipment and infrastructure in compliance with MFD standard plans are paid for by FM groups. This includes any offices collocated with the meetinghouse.
2. Guidelines for implementation costs and provider fees are set by the MFD and area offices. Requests for exceptions to these guidelines should be directed to regional facility managers or area offices.
3. **Theft and vandalism** must be reported to the FM group immediately.

Audiovisual (A/V) Equipment

Audiovisual (A/V) equipment may include, but is not limited to, televisions, projectors, projection screens, computers, media players, carts, audio systems, satellite systems, translation systems, and assistive listening devices.

Funding

1. **New Building Construction:** A/V equipment, included in new building construction as part of a meetinghouse standard plan, is paid for by the construction project and is thereafter repaired, upgraded, and replaced by the FM group in compliance with MFD standard plans.
2. **FM Provided Equipment:** FM groups may provide additional A/V equipment as directed by MFD. The costs for repairing, upgrading, and replacing this equipment, in compliance with MFD standard plans, are the responsibility of the FM group.

Inventory

1. FM groups keep an inventory of all A/V equipment included in new building construction or provided later by FM groups.
2. Local units keep an inventory of all A/V equipment purchased with local unit funds.
3. **Theft and vandalism** must be reported to the FM group immediately.

Webcasting

1. **Webcasting equipment** may include computers running Meetinghouse Webcast Software, the Webcast Communicator, cameras, mixers, tripods, and other A/V equipment.
2. **Appropriate Use:** See *Handbook 2: Administering the Church*, 18.3.1 and 21.2.10.

Funding

1. **New Building Construction:** Webcasting equipment included in new building construction as part of a meetinghouse standard plan are paid for out of construction project funds. They are repaired, upgraded, and replaced by the FM group in compliance with MFD standard plans.
2. **FM Provided Equipment:** FM groups may provide additional webcast equipment as directed by MFD. The costs for repairing, upgrading, and replacing this equipment, in compliance with the MFD standard plans, are the responsibility of the FM group.
3. **Local Unit Provided Equipment:** Under the direction of the stake president, local units may purchase additional webcasting equipment with local unit funds. The costs for maintaining, upgrading, and replacing this equipment are the responsibility of the local unit.

Inventory

1. FM groups keep an inventory of all webcasting equipment included in new building construction or provided later by FM groups.
2. Local units keep an inventory of all webcast equipment purchased with local unit funds.

Installation

1. Physical modifications to a meetinghouse, including the mounting of cameras, projectors, and projector screens, may only be done in compliance with MFD standard plans.
2. Physical modifications to a meetinghouse must be overseen by the FM group.

Personal Video Conferencing (PVC)

PVC equipment may include computers, web

cameras, microphones, and headsets.

Appropriate Use: See *Handbook 2: Administering the Church*, 18.3.1 and 21.2.10.

Authorized users include all Seventies, Area Presidencies, temple presidencies, mission and MTC presidencies, full-time missionaries, stake presidencies and their secretaries and clerks, high councils, stake technology specialists, bishops, and ward executive secretaries.

Funding

1. It is expected that PVC will be run from personally owned computers.
2. Under the direction of the stake president, local units may purchase low-cost web cameras and microphones for PVC. The costs for maintaining, upgrading, and replacing this equipment are the responsibility of the local unit.

Inventory

1. Local units keep an inventory of all PVC equipment purchased with local unit funds.

Related Articles

“Meetinghouse Technology Roles and Responsibilities”

Additional meetinghouse technology documentation and training are found at <http://mhtech.lds.org>.

Meetinghouse Internet Connectivity Policy

Internet access is typically provided at Church facilities, including administrative offices and meetinghouses. Leaders and managers ensure that it is used properly and wisely.

Internet Connections in Meetinghouses

Where high-speed Internet access is available at reasonable cost, stake presidents are encouraged to work with facilities management to install Internet connections in meetinghouses in accordance with Church policies. The stake president ensures that a capable stake technology specialist is called to manage Internet connections in the stake. Ongoing costs of Internet connections are paid from facilities

management budgets. All Internet connections in meetinghouses and small offices must use the Church-managed firewall device ordered through Church distribution centers.

Based on direction from general and area leaders, local leaders determine how to use meetinghouse Internet access to bless the lives of the Saints.

Additional guidance for local leaders and meetinghouse Internet can be found at <http://mhtech.lds.org>.

Meetinghouses and Family History Centers

Technology and communications resources are made available for meetinghouses and family history centers, based on Church guidelines, local needs, and the availability of equipment and infrastructure.

In the United States and Canada, the Meetinghouse Facilities Department provides and funds standard technologies, such as computers, printers, telephones, satellite equipment, wireless microphones, projectors and screens, and network equipment (including firewalls, cabling, switches, and wireless access points). Stakes may choose to acquire and fund optional technology (such as webcast and videoconference equipment) from their local unit budgets. The stake contacts Church headquarters to order optional equipment.

Outside the United States and Canada, the Area Presidency and director for temporal affairs determine which approved technologies are made available in meetinghouses. They determine the funding model for purchasing these technologies and authorize their implementation. In making these decisions, they consider factors such as the needs of the units, readiness of people to use it, availability of member expertise for support, and the effectiveness of the technology in meeting important needs. They also consider local economic and social conditions, which often affect the availability and acceptability of reasonably-priced technologies and the infrastructure to make them effective.

The stake president ensures that Church-provided technologies in meetinghouses and family history centers are deployed and used in accordance with

Church policies and guidelines (see *Handbook 1*, 17.1.12, and *Handbook 2*, 21.1.22; see also “Audiovisual Equipment in Meetinghouses” and “Internet Connections in Meetinghouses,” below). He is assisted by one or more stake technology specialists, whose responsibilities are described in *Handbook 1*, 13.3.3. Technologies used to manage the building (such as web-based HVAC controls) are overseen by the local facilities manager.

In some cases, the facilities manager may need to help the stake install, manage, and support meetinghouse technologies. Stake leaders always work with the facilities manager on technology issues that may impact a building’s structure, functionality, or aesthetics.

Meetinghouse technology documentation, training, and standards for local units and facilities managers are found at <http://mhtech.lds.org>. Stake technology specialists should contact the Global Service Center if they need additional help.

Missions

Outside the United States and Canada, the director for temporal affairs provides and supports technology and communications systems in missions within the area. In the U.S. and Canada, the Missionary Department at Church headquarters has this responsibility. For specific guidelines, see the *Mission President’s Handbook* (2006), page 70. Missions are allowed only the computer equipment listed in the “Computers” section of the *Mission Office Administration Handbook*.

Regardless of the location of the mission, the Missionary Department determines how many computers a mission office and a mission home may have. Missions may not purchase or use additional computers, including donated computers or computers belonging to missionaries. The Church does not provide technical support for computers that missionaries own personally.

Missions should use only software provided by the ICS Department at Church headquarters and should not develop their own software.

The Area Presidency or Presidency of the Seventy, working with the mission president, determines how

missionaries in the area should use computers and the Internet.

Temples

The Temple Department oversees computer systems in temples worldwide. This includes working with the ICS Department to determine the types and quantities of computers and printers used in temples and the software used on temple computers. The Global Service Center provides support for all computer, network, telephone system, and related technologies.

Internet access from within temples is managed by the Temple Department and is filtered by the ICS Department. Other means of connecting to the Internet from within temples, including wireless network access, are not authorized.

The ICS Department provides all temples with network connectivity to the Church's data network. Where possible and when requested by the Temple Department, ICS personnel (in the United States and Canada) or the area ICS manager (outside the U.S. and Canada) provides support, including computer equipment purchases and installations.

Seminaries and Institutes

Outside the United States and Canada, the director for temporal affairs provides and supports technology and communications systems in seminaries and institutes and their staff in the area. In the U.S. and Canada, the Seminaries and Institutes Department at Church headquarters has this responsibility.

Welfare and Humanitarian Services

Outside the United States and Canada, the director for temporal affairs provides and supports technology and communications systems for welfare and humanitarian facilities and staff in the area. In the U.S. and Canada, the ICS Department at Church headquarters has this responsibility.

Information Governance Policy

Information Governance Program Scope

The information governance program is documented within this policy and related information governance

processes. The following establishes Church leadership direction, expectations, and commitment for assuring appropriate governance of Church information and data.

The information governance program is administered by the information governance team, in the ICS Department. The program applies to all departments and operating units in the Corporation of the Presiding Bishop and the Corporation of the President. This program does not extend to Brigham Young University or other Church affiliates. The information governance program works with department managing directors, the Church Privacy Office, and the ICS Department to govern Church information and data access.

Acceptance of Shared Responsibility

Protecting Church information and data requires active participation from all who have access to Church data and information systems. It is the responsibility of each employee, volunteer, contractor, partner, and vendor to adhere at all times to Information Governance policy and procedures, as well as all other applicable security policies, standards, and procedures, when using Church information and data.

Roles and Responsibilities

Presiding Bishopric

The Presiding Bishopric has ownership and responsibility for the information and data assets of the Church. Under the direction of the First Presidency, the Presiding Bishopric makes the final determination in all data stewardship decisions.

Chief Information Officer

The chief information officer (CIO) represents the Presiding Bishopric and is authorized to make routine decisions on the Bishopric's behalf. His decisions may be appealed to the Presiding Bishopric. All information governance decisions made by the Presiding Bishopric and CIO are documented and distributed among key stakeholders.

Managing Directors

When a data domain has been designated to a department, the department's managing director assigns a data steward to fulfill the data steward responsibilities.

This assignment must be documented in the Data Sharing Portal and distributed among key stakeholders, by the Information Governance (IG) Team in the ICS Department.

Information Governance and Quality (IG) Team

The Information Governance program is authorized and governed by the Presiding Bishopric. The IG Team facilitates the process of assigning data stewards, the creation of data-sharing agreements, and the resolution of information governance issues.

The IG team also provides systems for governing Church data.

Data Stewards

Data used in Church systems must have a designated data steward. Department representatives (Product Managers), working with ICS solutions managers, are de facto data stewards until the department managing director assigns a data steward.

Data Steward Responsibilities

Data stewards are accountable to the CIO and the Presiding Bishopric with regard to their data stewardship responsibilities and compliance with Church policy pertaining to information protection. These policies include the Information Governance policy, the Information Security policy, including the Information and Systems Security Classification policy, and the Data Privacy policy. Data Steward responsibilities include but are not limited to:

- Ensuring that those collecting personal information provide adequate notice and obtain appropriate consent.
- Ensuring proper access to and use of the data.
- Ensuring the quality, completeness, and accuracy of the data.
- Ensuring the accuracy of the Data Sharing Portal entries about their data.
- Ensuring that data collected is properly classified for use, processing, and storage (see Information and System Security Classification policy).
- Ensuring that a Records Management Plan exists for

the disposition of records that use the data.

- Ensuring the IG processes are adopted and adapted, with assistance from the IG team.

Measurement and Reporting

To ensure that data is being accessed and used properly, EIM examines selected data elements and compares actual access to that data with authorized access (as documented in a data-sharing agreement).

Descriptions and classifications of Church data are captured in the Data Sharing Portal.

Information Security Policy

Information Security Program Scope

The information security program is documented within this information security policy and related information security standards and processes. The following establishes Church leadership direction, expectations, and commitment for assuring appropriate protection and use of the Church's information assets and resources. It also forms the basis for the minimally acceptable behaviors, practices, and controls necessary to safeguard Church information. The different document types that make up the information security program are defined here.

The information security program is administered by the CISO, in the ICS Department. The program applies to all departments and operating units in the Corporation of the Presiding Bishop and the Corporation of the President. This program does not extend to Brigham Young University or other Church affiliates that have their own information security programs.

Acceptance of Shared Responsibility

Protecting the Church's information systems and data requires continuous vigilance, with active participation from all who have access to Church data and information systems.

It is the responsibility of each employee, volunteer, contractor, partner, and vendor to adhere at all times to the instructions outlined in "Minimum Acceptable Employee Practices for Information Security" section of

this policy, as well as all other applicable security policies, standards, and procedures, when using Church computer resources.

Information Security Program Authority

The information security program is authorized and governed by the Presiding Bishopric. The Presiding Bishop delegates authority to the CISO to carry out the implementation and operation of the information security program. The CISO may exercise this authority in ways necessary to protect sensitive data and information systems. The CISO consults with Church leaders, department directors, and managers regarding Church objectives, risk management, compliance obligations, threats, and disruptions to Church operations. The CISO oversees efforts within Church departments necessary to bring operations into conformity with the information security program.

Information Security Program Design

The information security program is operated within the ICS Department, in close coordination with the Church Privacy Office, Church Security Department, Risk Management, and the Office of General Counsel.

The CISO manages the Information Security and Compliance (ISC) Division within the ICS Department. The ISC Division is responsible for and conducts the following activities:

- Coordination with other Church departments.
- Publication and enforcement of information security policy and standards.
- Training and awareness regarding information security.
- Compliance with data protection laws and regulations.
- Information security engineering and architecture.
- Information security operations designed to detect, defend, and monitor Church information processing and communications networks.

Components of the information security program are also loosely based on the following widely accepted public frameworks:

- The ISO 27002:2005 standard, Code of practice for information security management.
- The ISO 27001:2005 standard, Information Security Management Systems – Requirements.
- The Council on Cybersecurity’s Critical Security Controls.
- Privacy technical standards derived from the generally accepted privacy principles (GAPP) published by the American Institute of Certified Public Accountants (AICPA.)
- International, United States federal, state, and local laws and regulations.

Information Security, Controls, and Compliance

Trusted Solution Program

All very high-risk Church systems must obtain certification under the Trusted Solution program within the ICS department’s Information Security & Compliance division, regardless of whether the system is internal or cloud-based. Department portfolio working groups are responsible for prioritizing and funding the needed work necessary to achieve trusted solution certification. Church department managing directors support working groups in this work.

Roles and Responsibilities

Church Leaders and Managers

Church leaders and managers take appropriate measures to protect sensitive information wherever it is located. They ensure that Church computers and other systems are safeguarded from inappropriate access and use and that Church systems comply with Church policy, ICS Standards, data-protection laws, and privacy laws (see “Information and System Security Classification policy,” located within this Information Security policy). If Church systems or confidential information is believed to have been compromised, this should be reported immediately to the Global Service Center, at 1-801-240-4357.

Church leaders and managers also ensure that members of the Church workforce (Church employees, Church-service missionaries, contractors, and vendors)

complete the online Church information security awareness course annually, as requested from Church headquarters. See the Information Security Awareness standard for more information.

Director for Temporal Affairs and Area Legal Counsel

Outside the United States and Canada, the director for temporal affairs works with the area legal counsel, the ICS Department's IT Security Office, and the Church Privacy Office to help the Area Presidency ensure that the area follows local data protection and privacy laws. In the U.S. and Canada, the managing directors of Church departments fulfill these responsibilities for information security.

Directors for temporal affairs and managing directors of departments at Church headquarters have the primary responsibility to ensure that technology and communications systems received from Church headquarters are implemented correctly in the area or department. They should ensure that each system is functioning and that only authorized persons have access to the system or its data. Area ICS managers assist with this responsibility. Once a system has been implemented, the director for temporal affairs or managing director ensures that Church data continues to be protected as the system is used.

Minimum Acceptable Employee Practices for Information Security

Adherence to Password Standards

All employees must adhere to the requirements in the password standard.

Computer Workstation and Mobile Device Security

Church-owned computers must be secured from unauthorized access. Sensitive Church information must never be stored on computers that are not owned and managed by the Church, without prior approval of a director for temporal affairs or a department director. Storage of confidential and highly confidential Church information (see the Information and Systems Security Classification policy) on portable devices must be avoided where possible. Where an ICS portfolio director makes a risk-based decision to do so, an ICS-managed secure mobile device storage solution must be used by

users to store confidential and high confidential Church information.

Centrally-managed security and desktop management tools must be installed and functioning on Church-owned computers. This requirement is typically met when computers are obtained through the ICS Department.

Physical Security of Church Information and Technology Resources

The Church Security Department policies pertaining to the physical security of facilities applies to the protection of computing devices, hardware, and other information processing resources. See "Security of Facilities" and "Security of Information" in the "Security and Safety" section of Policy Point. When provided, all Church employees and contractors must use electronic access control badges on the readers located on turnstiles, gates and doors they pass through. Tailgating, while convenient, is not permitted.

Volunteers and members of Church workforce should take care to maintain a clean work area. They should not leave sensitive information lying visibly in workspaces. Nor should they place sensitive material in regular wastebaskets. In most facilities, secure shredding bins are provided for the destruction of confidential and sensitive documents.

When sensitive information is sent to a printer, it should be retrieved immediately so that it is not left in plain view. Those who print sensitive information should use the printer's secure print feature, if available. This feature requires users to enter a four-digit code in order to retrieve the printout.

Director for temporal affairs and managing directors of headquarters departments ensure that employees understand the need to protect Church computers, information, and other technology resources and that they understand related policies and guidelines. They take particular care to ensure the physical security of mobile computing devices. For example, they teach employees that laptop computers must never be left in vehicles or checked as airplane luggage.

At Church headquarters, the Meetinghouse Facilities Department has overall responsibility for network

cabling and for rooms where servers and networking, communication, and other technology equipment are kept. Outside the United States and Canada, directors for temporal affairs have this responsibility. Area ICS managers work with physical facilities personnel to secure and maintain these facilities according to standards and guidelines provided by the ICS Department.

Disposal of Old Equipment and Data-Storage Devices

When devices or media that contain or have contained sensitive Church information are to be disposed of—including computers, mobile phones, disk drives, removable data-storage devices, copiers, printers, digital video recorders, and other devices with persistent memory—they must be disposed of in a legal and secure manner. If equipment can be reused internally for other Church purposes, ICS personnel or the area ICS manager ensures that sensitive data is securely erased so that it is not retrievable. The standard delete or format function is not adequate. Mobile phones should be reset to the original default settings, and any removable memory should be removed and disposed of separately.

If a data-storage device or medium containing sensitive information cannot be reused for Church purposes, it should be physically destroyed. It should not be erased and allowed to leave Church ownership.

Duty to Report Concerns (Information Security Incident Reporting Policy)

All potential information security incidents will be promptly reported to the Global Service Center, at 1-801-240-4357.

All volunteers and members of the Church workforce have a duty to report immediately any concerns regarding information security to the Global Service Center, at 1-801-240-4357. Examples of reportable matters include:

- Loss of computers, tablets, mobile devices, or computing hardware, software, or storage media.
- Suspicious e-mail messages.
- Suspicious phone calls asking for information.

- Unusual computer activity.
- The existence of anomalous computer data.

An information security incident may or may not involve information technology.

Theft or Loss of Church Computers or Information

When a Church computer, data-storage device, or mobile phone is lost or stolen, or when it is believed that sensitive data may have been lost, misused, or compromised, the incident must be promptly reported as a potential information security incident to the director for temporal affairs or managing director and the Global Service Center, at 1-801-240-4357.

Such incidents are particularly urgent when they involve private information about individuals, criminal activity, or incidents threatening significant harm or loss to individuals or the Church. Such incidents should be reported even if they do not involve information technology (for example, when paper records are lost or stolen).

Information and Systems Classification Policy

Information Handling Requirements by Role

Information Users

Each information user must exercise due care in protecting information by applying the controls and conditions defined for its use. Each information user must report apparent breaches of sensitive information to the ICS Security Operations Team by calling 1-801-240-1919.

Department Managing Directors

When a data domain has been designated to a department, the department's managing director assigns a data steward to fulfill the data steward responsibilities. This assignment must be documented in the Data Sharing Portal and distributed among key stakeholders, by the Information Governance (IG) Team in the ICS department.

Data Stewards

Data stewards determine the *information classification* for confidentiality and privacy for all

assigned data and information resources. Data stewards over highly confidential data are responsible for ensuring the requirements found in the Highly Confidential Data Handling standard are met within their department, and by other departments who use such data. Department representatives (Product Managers), working with ICS solutions managers, are de facto data stewards until the department managing director assigns a data steward. Additional responsibilities of the data steward are found in the Information Governance policy.

Product Managers

Product managers manage the *system classification* for a solution, system, or application. Product managers use the highest information classification applicable in determining the system classification according to this policy.

ICS Solution Managers

Solution managers work closely with product managers to ensure that appropriate *system security classifications* are made. Solution managers must also ensure that their solutions are properly specified in the ICS software service and asset inventory systems of record (see the Configuration Management Standard). Solution managers are responsible for ensuring that a Preliminary Risk Impact Assessment (PRIA) is completed for each solution they are responsible for. The PRIA is available from the ICS information security division's risk managers. Solution Managers also ensure that the appropriate controls are considered and implemented during the solution delivery process. More information about the PRIA can be found in the IT Service Catalog.

System Owners

Where applications or systems are not supported by ICS, the system owner, product manager, or someone with a similar role must fulfill the ICS solution manager's responsibility to understand and implement requirements specified by applicable ICS standards.

Responsibilities for Shared Repositories

When information is in a common repository for shared use, such as a database or data warehouse, the persons responsible for that repository must follow

access and handling controls and conditions of use established by the several responsible stewards. Controls must be applied based on the highest level of sensitivity of the data stored or processed in the repository.

Handling Highly Confidential Information

See the Highly Confidential Data Handling standard for requirements.

System Risk Classification Requirements

Systems that store or process sensitive information are at risk of unauthorized disclosure, i.e. system security risk. To manage this risk, systems are classified into four categories: low risk, moderate risk, high risk and very high risk. The following table shows how information classification determines security risk:

Very high risk systems must achieve certification under the Trusted Solution program.

Some Church departments, such as the Church History Department, use their own classification schemes. ICS Information Security Risk Managers may assist data stewards and ICS solution managers in applying the appropriate classifications. Information Classification

Confidentiality Classification Categories

Information and electronic data will be classified into one of four categories. The following list describes each category, in order of increasing confidentiality:

- **Public.** Information formally approved for public release that must be protected at its official source against loss or change. Includes scriptures, curriculum materials, news releases and official information about the Church and its doctrines.
- **Internal Use.** Information generally accessible within the Church but not intended for entities or persons outside the Church. May have additional handling or access control requirements. Includes most e-mail, other correspondence, and documents; organization charts; employee work e-mail addresses and telephone numbers; and most software. This is the default classification when no higher confidentiality requirements exist.

- **Confidential.** Information requiring special handling and controls specific to each work environment that limit access and use. Includes any information about or possessed by the Church that is generally considered by Church authorities, senior management, or the Intellectual Property department to be sacred, private, or confidential. Also includes most personal information (such as salary and performance information); organizational plans, strategies, and changes not yet decided or announced; and most organization financial information. For purposes of this policy, Confidential Information should be broadly construed.
- **Highly Confidential.** Information with the highest degree of sensitivity where confidentiality, integrity, and regulatory compliance needs are very high and a failure in protection could have severe repercussions. Requires the strictest rules of handling and usage. Includes payment card information (PCI), certain personal identifiers, encryption keys, passwords, financial information aggregated above the department level, physical security information, information impacting personal safety, disciplinary council and other sensitive member information, and very sensitive general authority communications.

Information Security and Compliance Incident Management Policy and Protocol

Policy Source

This policy is issued under the authority of the Presiding Bishopric. Inquiries should be directed to the Church Chief Information Security Officer (CISO).

Principles

Information security incident management allows ICS, under the direction of the Presiding Bishopric and First Presidency, to oversee and coordinate incidents to appropriately protect the Church and others potentially affected.

Scope

This policy applies to all Church organizations within the Corporation of the Presiding Bishop, the Corporation of the President, and international areas.

Synopsis

In the First Presidency Letter, *Managing Critical Incidents*, dated March 20, 2013, the First Presidency assigns the Presiding Bishopric as responsible to manage certain incidents, including all information security and information compliance incidents. The Presiding Bishopric has delegated management responsibility for information security and compliance incidents to the ICS Department. ICS incident management and incident response protocols and procedures are used to identify, investigate, contain, and manage such incidents.

An *information security incident* is a single or a series of unwanted or unexpected information security events that are likely to threaten Church business operations and compromise information. Incidents often involve cyber-attacks, loss or compromise of information, cyber-crime, or loss or compromise of electronic systems or devices.

Information compliance incidents involve legal and industry compliance responsibilities related to information protection and breach notification: Payment Card Industry Data Security Standard (PCI-DSS), US Health Insurance Portability and Accountability Act (HIPAA), US Graham-Leach-Bliley Act (GLBA), European Union Data Protection Directive (EUDPD), UK Data Protection Act (DPA), Canada Personal Information Protection and Electronic Documents Act (PIPEDA), and many other information protection and breach notification requirements.

As a matter of course, the ICS Information Security Operations Center (ISOC) handles daily information security and information compliance incidents. *Significant incidents* are those information security incidents posing sufficient risk as to be escalated to the Information Security Incident Response Team (ISIRT). The ISOC and the ISIRT operate around the clock and are expertly qualified and credentialed to handle all electronic and information-related security and compliance issues.

Major incidents are escalated by the ISIRT to, and managed to closure by, the Chief Information Security Officer (who typically organizes a major incident management team with representatives, as necessary, from the affected organization, ICS, Legal, Public

Affairs, Privacy, Church Security, etc.). The ICS managing director and the Presiding Bishopric are advised and provide direction on major incidents.

As defined in the First Presidency's *Managing Critical Incidents* letter, "A 'critical incident' is defined to mean a circumstance which is complex, sensitive, or high risk" to the Church. The Presiding Bishopric notifies the First Presidency "of critical incidents as soon as possible". "Under the direction of the First Presidency, the Presiding Bishopric will inform the Quorum of the Twelve" and other Church leaders regarding critical information security and information compliance incidents.

Requirements

1. All suspected information security or compliance incidents and concerns must be immediately reported by employees, contractors, volunteers, third parties, and other workforce members to Global Services (i.e., the Help Desk) at 801-240-4357, or ICS Security Operations at 801-240-1919. An information security incident may or may not involve information technology. Examples of suspected information security and compliance incidents and concerns include:
2. Loss of computers, tablets, mobile devices, computer hardware, software, or storage media including USB or other devices containing Church data, especially credit card, personal health information, or member's personal information
3. Suspicious email, phone, text, or other messages
4. Unusual or unexpected computer data, files, or behavior
5. The Chief Information Security Officer (CISO) is responsible to implement incident management procedures and other controls capable of enabling prompt detection of security events and response to information security incidents, including the following:
 1. Ensure information security weaknesses are communicated in a manner allowing for timely and meaningful corrective action to be taken
 2. Collect, analyze, and correlate security events from

a variety of sources and promptly identify and classify attempted and successful security breaches and incidents

3. Maintain adequate records of security events and incidents, including chain of custody and other evidence handling techniques when appropriate
 4. Escalate significant security incidents and incident information in a timely and effective manner
 5. Evaluate security incident causes and effects sufficient to reasonably and consistently determine that an incident is contained and eradicated
- Please also refer to:

- Incident Response Standard
- Major Incident Management Guideline

Identity and Access Governance Policy

Identity and access governance refers to the processes, technologies, and policies for managing digital identities and controlling how identities can be used to access resources.

Principles

The purposes of identity and access governance are to:

- Ensure that the right information is shared at the right time, with the right people, for the right purpose.
- Promote accuracy and accountability of workforce behaviors.
- Enable line managers and entitlement owners to manage access within their area of responsibility.
- Ensure that access management controls reflect business policies and legal requirements and promote the least privilege approach to user rights.
- Facilitate defined user access requests and track approvals.
- Establish sustainable certification processes that regularly validate user access.
- Ensure the integrity and availability of digital identity identifiers, credentials, and attributes.

Individual User Accounts

An LDS Account provides each registered user with a single ID and password to access most Church technology and communication services. This gives the Church a convenient and affordable way to control access to different resources based on an individual's role within the Church. The ICS Department manages LDS Accounts.

The person to whom an LDS Account is assigned is responsible for all actions and activities performed with the account. He or she is also responsible for updating contact information when needed, and protecting and maintaining access credentials (such as passwords or PINs) on the account. All passwords must adhere to the password standard.

Entitlement Owner

The entitlement owner is responsible for the specific attribute or group of attributes that enable access to information resources. Duties include:

- Defining and maintaining the entitlement request and removal processes, including any exception processes.
- Certifying entitlement membership at least annually.
- Maintaining applicable controls over separation of duties.
- Taking appropriate action for access violations.

Group or Role Owner

The group or role owner has oversight responsibility and makes sure that the entitlements, membership, and controlling processes for a group or role are appropriate. Duties include:

- Maintaining appropriate entitlements for the group or role.
- Defining and maintaining request and removal processes for the group or role, including any associated exception processes
- Periodically certifying membership.
- Maintaining applicable controls over separation of duties.

- Taking appropriate action for membership violations.

Credential Management

Users must agree to a compliance statement before being issued an account that accesses any Church information resources. Users other than the account owner should not know a user's password. Additional information and requirements can be found in the password and authentication standards.

A user account must uniquely identify the account owner to whom it was originally issued.

Usage Management

Access should be logged and monitored according to user or activity risk as maintained in the system logging and monitoring standard.

Directors for temporal affairs and department directors maintain the authority to:

- Restrict or revoke user access privileges for conduct contrary to the intended use of Church information systems.
- Monitor, inspect, copy, remove, or otherwise alter information stored in or sent through Church information systems that is contrary to the intended objectives of those systems. Users should have no expectation of privacy associated with this information, and examinations may take place with or without the consent, presence, or knowledge of the involved users.

Authentication Management

Strong authentication should be used for all access to highly confidential systems and data. Additional information and requirements can be found in the authentication standard.

Penetration Testing and Vulnerability Assessment Policy

Penetration testing and vulnerability assessments are attempts to breach computer applications, systems, and networks. These actions may be interpreted as legitimate threats and attacks. Unauthorized performance of the activities described in this policy will not be tolerated. Adherence to this policy by all Church employees and contractors promotes compliance with international,

federal, and state laws pertaining to the unauthorized access of Church information and computer systems.

Vulnerability assessment, and security and controls testing, are necessary and valuable activities that must be properly approved. They must not be allowed to provide a cover for improper activities.

Penetration testing and vulnerability scanning techniques are generally used to determine or confirm risks with Internet-facing applications and information technology resources of high value. Such assessment and testing are considered when:

- Risk assessments, vulnerability scans, or other intelligence points to specific threats.
- Externally-facing web applications may expose Church data.
- There is a significant risk to the Church's reputation.
- Applications contain sensitive or critical data or provide a path to such data.
- Data indicates that there is a poorly protected, high-risk condition.
- Major infrastructure changes or new applications may introduce new risks.
- Additional evidence is needed to confirm the seriousness of suspected vulnerabilities.

Because penetration testing and vulnerability assessments can be very disruptive to business and to information technology systems and processes, these activities must be conducted in a controlled and authorized manner.

Hacking Tools and Activities

Internal users and contracted third parties on Church premises, using Church equipment, or performing Church work must not possess or use hacking tools and must not engage in hacking activities without authorization. Vulnerability scanning and penetration testing can be conducted only by explicitly approved individuals and in accordance with this policy.

Authorization

The CISO (or someone designated by the CISO) may authorize internal individuals or third parties to perform vulnerability assessments and penetration testing. Assessors are authorized provided they follow the penetration testing and vulnerability assessment standard established by the CISO.

Liability of Testers and Assessors

Testers and assessors acting under the direction of the CISO and consistent with these policies and the associated standards document will be held harmless and not subject to disciplinary action or liability for unintentional outcomes. Any penetration testing conducted outside of these policies and the associated standards document is not authorized and may result in legal and disciplinary action, including termination of employment.

Testing results conducted as part of the ICS solutions delivery process are reported to the appropriate solution manager. Testing results performed by contracted third parties, ICS Security Operations, or at the request of the CISO are reported to the CISO. The CISO periodically makes adjustments to this policy and the testing and assessment processes, as needed, to achieve a good balance between risks and benefits.

Highly Confidential Information Access Policy

Workforce Screening for Highly Confidential Access

Some Church employees and volunteers are granted access to restricted and sensitive information. Church leaders and managers rely on members of Church workforce to remain trustworthy.

Authorization Requirements for Highly Confidential Information Access

All Church workforce personnel must meet the following screening requirements in order to access high-risk and highly confidential Church information, functions, or facilities:

1. Meet all standard worthiness and employment qualifications.
2. Pass a background check conducted by the Church Security Department.

3. Pass a background check conducted by a private, third-party contractor that specializes in employee background checks.
4. Receive endorsements from his or her manager and director.
5. Undergo ongoing background monitoring and continue to meet background qualifications.
6. Be approved by the CISO.

Access to specific information, applications, or facilities may require additional approval of a responsible data steward.

Endorsements from additional interviewers may be required by senior leadership or data stewards for those who will work closely with General Authorities or who will have access to restricted data center facilities.

Administration Requirements

The Office of the CISO is responsible for initiating additional background processing, administers the process, maintains approved access lists, and securely maintains records associated with the screening performed.

The Church Security Department (CSD) processes restricted-access background checks for those at Church headquarters in the same way it does for CSD employees.

Use of Private, Third-Party Contractors to Perform Background Checks

The Office of the CISO will ensure that a third-party performing background checks on its behalf has submitted a signed certificate of compliance. The certificate of compliance must be renewed annually.

Employee Disclosure, Notification and Procedural Requirements

1. The employee being screened must receive and sign a “Disclosure of and Authorization for Background Investigation” before the screening process begins.
2. If a disqualifying item is discovered, the employee under investigation receives a copy of the adverse report and a signed copy of a “Pre-adverse Action Disclosure.” The employee is given seven days to

review and refute the disqualifying items.

3. When a final determination is made to withhold or revoke restricted access, the employee is given a copy of the adverse report and a signed copy of a “Notice of Adverse Action.”

Grounds for Denial of Restricted Access

Restricted access can be denied or revoked at any time, for any reason. The following factors may also be used to determine when to deny restricted access:

1. Commission of any of the “Behaviors Prompting Corrective Action” found in the *Church HR Policies and Code of Business Conduct*.
2. Any issue reported by a current or former ecclesiastical leader to the Church Security Department that reflects negatively on the employee’s honesty and trustworthiness.
3. Any record of a crime, including misdemeanors, that reflects negatively on the employee. These may include admissions demonstrating lapse in judgment; commission of acts considered dishonest, fraudulent, or subversive; and crimes, including theft, burglary, larceny, embezzlement, fraud, computer crimes, and other crimes of moral turpitude.
4. An employee may qualify for Church employment and possess a current temple recommend and still not qualify for restricted access based on the requirements of this section.

Handling Highly Confidential Information

Highly Confidential Information must be accessed, handled, stored, transmitted, or processed only in accordance with the Highly Confidential Data Handling Standard.

Physical Access to Restricted Data Centers

Certain individuals who meet the requirements in “Workforce Screening for Highly Confidential Access” above and who demonstrate a qualifying need are granted physical access to restricted data centers.

Authorization Requirements for Access to Restricted Data Centers

In order to be granted physical access to restricted data centers, Church workforce personnel must meet the “Authorization Requirements for Highly Confidential Information Access” listed above. Additionally, physical access is granted only to individuals who appear on the Approved Access List.

Administration Requirements

The Approved Access List is maintained by the Office of the CISO. Inclusion in this list is determined in accordance with the requirements found in the Restricted Data Center Physical Access Standard.

Cloud Computing Policy

“Cloud” computing is a metaphor for software, platforms, and infrastructure products provided “as-a-service” and delivered remotely through the Internet. **Cloud computing has tremendous potential to improve information and technology services and to reduce costs. There are accompanying security, compliance and operational risks. Cloud computing services must meet all Church policies and standards. Church departments and staff work through ICS to evaluate, select, and operate premise-based and cloud solutions. Sound governance and controls help the Church receive maximum benefit from pragmatic cloud computing adoption, while wisely managing associated risks.**

Department heads or their authorized designees engage with their respective ICS portfolio director to address information and technology needs. If a cloud service is contemplated to meet a need, the assigned ICS portfolio director will consult closely with the portfolio’s architect, risk manager, and vendor management representative. The portfolio will consider cloud services based on ICS strategies, principles, and processes. They will ensure Church and department needs are being met in the best way possible. If a cloud service is a viable option, a *Cloud Suitability and Risk Assessment* will be completed.

With the support of the solution manager, architect, risk manager, and vendor management representative, the portfolio may select a cloud service and provide it following the Solutions Delivery process. Assigned ICS portfolios work hand-in-hand with departments through this process. ICS portfolios will rely on vendor

management to negotiate contracts with cloud service providers and ensure there is an appropriate cloud computing service level agreement (SLA). In the case of high-impact or high-risk solutions, the portfolio director should also seek the support and guidance of the ICS Cloud Service Governance Board or its designees.

Special Cloud Requirements and Considerations:

- All Church information and technology needs, including those met through cloud services, are met via the Solutions Delivery process and follow approved architectural, security, vendor management, and operational standards and guidelines.
- Church policies, standards, and compliance requirements apply to Church information and technology resources, whether provided on premise or consumed from external service providers, including cloud service providers.
- Engaging with a cloud service provider for a new service, or transitioning from an on premise resource to a cloud service, does not exempt Church data and information resource stewards from meeting Church policies or external regulations.
- Partner-facing ICS portfolios may appropriately consider and use cloud software-as-a-service (SaaS) solutions. These portfolios are not authorized to engage in arranging separate platform-as-a-service (PaaS), infrastructure-as-a-service (IaaS), or other cloud service. These services are delivered and managed by internal ICS portfolios. No ICS portfolio is to arrange cloud services for technologies outside of their assigned stewardship.
- Highly-confidential Church information must never be stored, processed, or handled in 3rd-party owned or managed computing environments, including cloud computing environments. (see Information Security Policy)
- ICS is responsible to enable Church organizations by brokering, creating, adapting, and transitioning information and technology resources to meet Church or department needs, whether provided on premise or consumed from external service providers, including cloud service providers. Church

departments and affiliates engage cloud services and cloud service providers through their assigned ICS portfolio.

- All Church cloud services contracts must be managed by the ICS Vendor Management Office (VMO), must be executed by the Materials Management Department (MMD) Purchasing Division, and must make use of the Cloud Computing SLA.

Technology Acquisition Policy

Computers, mobile devices, and software that the Church acquires are the property of and are owned by the Church. Their acquisition and use is governed by Church-wide policies and procedures in accordance with best industry practices for managing information technology assets.

Computers and commercial software are acquired as needed to support valid business functions and are replaced or upgraded when new releases from software vendors become available, when appropriate contractual arrangements have been completed, or when appropriate hardware replacement schedules have been satisfied.

Proper acquisition, tracking, and management of information technology assets is necessary in order to meet contractual obligations and comply with terms and conditions to which the Church and suppliers have agreed.

Funding

All funding is approved by the Budget and Appropriations Committee. Requirements for technology funding are specified annually in Church Budget Office guidelines.

Church headquarters departments and areas use department and area budgets to acquire and replace computers and software, in accordance with those guidelines.

Acquisition of Technology in the United States and Canada

The ICS Department obtains computers on behalf of Church headquarters departments and areas in the United States and Canada. Church departments and

areas should not obtain their own computers or technology outside of established ICS processes. The Church receives volume discounts and affordable support costs when computers, workstations, mobile devices, tablets, and related equipment are purchased by a centralized entity within the Church according to uniform standards.

Similarly, Church departments and areas are not authorized to develop or purchase their own application software. If a unique need arises, the area or department works with the ICS Department to determine how to meet that need. The ICS Department (1) determines whether existing software can be used, (2) determines if other areas or departments have a similar need, and (3) works closely with Portfolio Working Groups and process owners to prioritize the need to develop or purchase the software with other Church technology needs. Once resources are allocated, the ICS Department manages the development or purchase of the software, makes sure it is supportable and fits into the Church's worldwide infrastructure, and works with the Director for Temporal Affairs or managing director to implement the software.

The Church may provide employees with technology devices for use in conducting official Church business outside the workplace when there is a business-related reason for doing so. A department or area may authorize an employee to use Church funds to purchase a technology device when its primary use will be for Church business. When an employee's use of technology resources will not be primarily for Church business, Church funds may not be used to purchase it. However, an employee may request reimbursement for business-related use of an electronic communications device or service that he or she purchased, according to the department's policy.

The Presidency of the Seventy determines the need for mobile phones and handheld devices for Church leaders in the area. They are authorized to provide these resources to Area Seventies and other leaders if they cannot provide them on their own.

The Presidency of the Seventy and mission presidents determine the need for cell phones for missionaries.

Computers, workstations, mobile devices, tablets, and related equipment should not be replaced any earlier

than necessary. This equipment and the software on it is subject to the ICS asset management processes to ensure compliance with legal and contractual obligations.

Tablet devices are approved only in limited circumstances, when needed to accomplish Church business. Managing directors and directors of temporal affairs make this determination for members of the workforce. The Presidency of the Seventy makes this determination for members of the Seventy and other Church leaders.

The following standards documents provide for more information regarding standard and nonstandard products, replacement cycles, device usage requirements and restrictions, support, and exceptions:

- Computer Workstation Standard
- Mobile Phone Standard
- Tablet Computer Standard

Processes for Acquiring Standard, Nonstandard, and Exception Products

The ICS Department establishes and maintains a collection of standard products: computer workstations, mobile devices, tablets, information technology infrastructure components, software products, and services. Standard products can be acquired using the technology acquisition and replacement process (described in the *Service Catalog*). Standard products acquired through the *Service Catalog* follow the Technology Acquisition & Replacement Process. Commercial software is not to be acquired through cash or credit card purchases (including Church P-Cards), regardless of the amount of the purchase. In all cases the *Service Catalog* and Technology Acquisition & Replacement Process should be used.

Nonstandard products are those not listed in the *Service Catalog* but available through existing purchase contracts, licenses, or service agreements with the Church. Not finding a particular software title in the main body of the *Service Catalog* requires using the nonstandard and exception technology acquisition process, also available in the *Service Catalog*. Nonstandard products for workstations, mobile phones, and tablets are allowed under very limited circumstances (see the standards documents listed

above).

Exception products are products not available in the *Service Catalog* and for which no existing vendor contracts are in place. Before an exception product can be acquired, the Vendor Management Office in the ICS Department must establish a contractual relationship with a supplier. For more information, see the nonstandard and exception technology acquisition process.

Software Licensing

All software installed on Church-owned computers must have a valid license and proof of purchase that can be audited. Commercial software acquired through the technology acquisition and replacement process makes use of the Church purchasing system (including eMarket), which provides acceptable proof of purchase records automatically. Under no circumstances should software not licensed by the Church be installed on Church computers and workstations. Installation of personally-owned software is prohibited.

Asset Tracking and Inventories

The ICS Controller's office maintains an inventory of network switches, routers, computers, software, and telephone systems connected to the internal Church network, according to the asset tracking process.

Support

The ICS Department supports standard computer hardware and software. This support may be obtained by contacting the Global Service Center.

Acquisition and Replacement of Technology outside the United States and Canada

Outside the United States and Canada, the Area Presidency and director for temporal affairs determine the funding model for purchasing technologies and authorize their implementation. In making these decisions, they should consider factors such as the needs of the units, readiness of people to use it, availability of member expertise for support, and the effectiveness of the technology in meeting important needs. They also consider local economic and social conditions, which often affect the availability and acceptability of reasonably-priced technologies and the infrastructure to make them effective.

The Area Presidency and director for temporal affairs ensure that Church leaders, employees, missionaries, and volunteers have the approved computer equipment they need to perform their duties. They also determine which standard, ICS-approved technologies are implemented in meetinghouses, missions, seminaries, institutes, and welfare and humanitarian facilities. The Temple Department oversees computer systems in temples worldwide.

Using standards and procedures established by the ICS Department, the director for temporal affairs purchases additional or replacement computers according to the replacement schedules established in the ICS Standards for each type of device.

The Area Presidency determines the need for mobile phones and handheld devices for Church leaders in the area. They are authorized to provide these resources to Area Seventies and other leaders if they cannot provide them on their own.

The Area Presidency and mission presidents determine the need for cell phones for missionaries.

Processes for Acquiring Standard and Nonstandard Products

The ICS Department at Church headquarters generally provides worldwide technology programs and major initiatives. This includes, but is not limited to, the Church network, global satellite systems, enterprise e-mail, Church websites, and worldwide applications. Area offices fund technology and communications resources (excluding desktop or laptop computers, phones, cell phones, tablet computers, or similar electronic devices) for area programs and local initiatives. These include administrative offices, meetinghouses, missions, temples, and welfare facilities.

When special or local needs require additional resources, the area works with the ICS Department to identify or develop alternative resources to meet those needs in a cost-effective way. Such resources must meet criteria established by the ICS Department, which includes compatibility, integration, security, privacy, and other requirements.

Asset Tracking

The area ICS manager maintains an inventory of all

application systems and all servers in the area, including those that are locally supported and funded. The inventory should be reviewed annually with a representative from the ICS Department at Church headquarters and should indicate who has agreed to support these systems and servers.

The area ICS manager also maintains an inventory of individual computers, valuable assets (>\$1,000 USD), assets that store sensitive data, or any other technology asset as determined by the area ICS manager, including those in service centers, mission offices, and other small offices for which the area has responsibility. This inventory should include a description of each item, its serial number and identification number, the year it was acquired, its location, and the name of the assigned user, as applicable. It should also include information about how each asset was obtained and its disposition, location, and disposal.

The area ICS manager ensures compliance with software licensing agreements, maintains a centralized log of software use, and maintains technology documents and certificates, such as product registrations, maintenance agreements, and service contracts.

Software

The director for temporal affairs ensures that all software used on computers in the area, including software used in local units, is authorized, adequately protects information, meets licensing agreements, and complies with local laws.

Area offices are not authorized to develop or purchase their own application software. If a unique need arises, the area works with the process owner (sponsoring department) and the ICS Department to determine how to meet that need. While working with the process owner, the ICS Department (1) determines whether existing software can be used, (2) determines if other areas or departments have a similar need, and (3) prioritizes the need to develop or purchase the software with other Church technology needs. Once resources are allocated, the ICS Department manages the development or purchase of the software, makes sure it is supportable and fits into the Church's worldwide infrastructure, and works with the director for temporal affairs to implement the software.

Technology Use and Internet Access Policy

This policy applies to Church Workers (collectively referred to as “users”) in use of Employer’s Technology Resources or in performance of Employer’s work. Employer’s Technology Resources are for Employer business-related purposes and are provided to certain users to assist them in performing their job duties or assignments. Each user should use Employer’s Technology Resources in a manner that increases productivity, enhances Employer’s public image and respects others.

All activities and conduct in use of Employer’s Technology Resources must maintain the highest standards associated with the sacred nature of the Church’s work and mission and be in accordance with Employer’s policies. Failure to do so may lead to disciplinary measures, up to and including immediate termination of employment, contract, or assignment.

Technology Resources Definition

“Technology Resources” consist of all electronic devices, data, software and means of electronic communication, including but not limited to computers of all types; tablets; communication devices and equipment such as telephones, mobile phones, smart phones, voicemail and video conferencing; data and video recording and storage devices; peripheral devices such as printers, modems, fax machines and copiers; network, infrastructure and electronic communication devices; all associated operating and application software; and all associated files and data. This policy may be modified or changed at Employer’s discretion as new technology becomes available or as operational needs change.

“User Technology Resources” are personally-owned technology resources used to conduct Employer business. These resources should not be used as the primary means for accomplishing work activities.

Technology Resources Use

Employer’s Technology Resources are to be used by users only for the purpose of conducting Employer business, with the exception of occasional and incidental personal use that does not interfere with the intended

function of the equipment or decrease personal productivity, does not increase maintenance or other costs and does not involve inappropriate activity or conflict of interest. Use of file-sharing networks are not appropriate for Employer’s Technology Resources. Employer assumes no liability for loss, damage, or misuse of any personal data or communications stored in or transmitted over Employer’s Technology Resources. Employer strongly discourages users from storing any personal data on Employer’s Technology Resources. Use of Church computer workstations must comply with the computer workstation standard.

User-owned desktop and laptop computers may not be connected to the Church network, other than VPN access away from the office, or other approved uses. User-owned software may not be installed on Church-owned computers. Church-owned software may not be installed on user-owned computers. This does not include the purchase of software by employees through Church discount programs with software vendors, such as the Microsoft Home Use Program and Sophos Home Use Anti-Virus, which are available in the ICS Tech Service Catalog.

Mobile phones must be used in accordance with the mobile phone standard. Tablets must be used in accordance with the tablet computer standard, and both mobile phones and tablets must be used in accordance with the mobile device security standard. Users grant Employer permission to remotely manage, disable, collect all data from, including personal data, or erase the entire contents, including personal data, of any mobile devices that are:

- Employer’s Technology Resources;
- User-owned Technology Resources using Church voice and data plan offerings;
- User-owned Technology Resources that synchronize Church email to the device.

Departments and areas that use of Internet-based data storage and application services such as Dropbox, Google Docs, and Yammer must exercise great care. Storage and transmission of highly confidential data in these services is not permitted unless the data is encrypted at rest and during transmission in accordance with the data encryption standard.

Loss of any Church-owned computer must be reported promptly to the Global Service Center (1-801-240-4357).

Improper Use

It is a violation of Employer's Technology Resources policy for any data composed, sent, or received via Employer's Technology Resources to contain content that may be reasonably considered offensive or disruptive. Material that is fraudulent, harassing, sexually explicit, profane, obscene, intimidating, defamatory, or otherwise unlawful or inappropriate may not be sent by e-mail or other forms of electronic communication (e.g., social media, bulletin board systems, newsgroups, chat groups) or created on, displayed on, or stored in Employer's Technology Resources. Users encountering or receiving this kind of material should immediately report the incident to their HR representative.

Obscene, Pornographic, or Sexually Related Material

It is an absolute violation of Employer's Technology Resources policy for any user using Employer's Technology Resources to intentionally receive, send, compose, display, or access in any manner any material that is obscene, pornographic, or sexually related (including but not limited to images containing sexually provocative nudity). Any user who is found to have violated this provision of the Employer's Technology Resources policy shall be immediately terminated from employment or shall have their contract or assignment immediately terminated.

Other Prohibited Uses

Users may not use any of Employer's Technology Resources for any illegal purpose, in a manner that violates any Employer policy or that is contrary to the best interests of Employer, in any way that discloses confidential or proprietary information of Employer or third parties, or for personal or pecuniary gain. Use of Employer's Technology Resources to engage in any form of gambling or online gaming is also prohibited. Users may not attempt to access any Employer's Technology Resources without authorization nor exceed authorized access. Users may not use deceptive methods to gain access nor attempt to compromise security controls

without explicit authorization.

Users who use "Near Field Communications" technology (e.g., ISIS Mobile Wallet™) to transmit wireless payments from their mobile device do so at their own risk. The Church does not guarantee the security of these systems or accept any liability in the event of a personal loss.

Employer Access to Technology Resources

All messages, including personal messages, sent and received and all data and information stored on Employer's Technology Resources are Employer's property regardless of the content. As such, Employer reserves the right to access all of its Technology Resources at any time in its sole discretion.

Privacy

Internet browsing through Church systems is filtered, monitored, logged, and reported on regularly. The ability to connect to a specific website does not in itself imply that visiting that site is appropriate. Users should have no expectation of privacy when accessing the Internet through Church Technology Resources. The ICS Department screens and reports potential Internet abuse to the organization's leader for follow-up. Church leaders and managers may contact the ICS Department if they need usage reports or investigation support. Users who require, for Church-related purposes, less restrictive Internet access than the default access level must obtain the necessary approvals, as outlined in the web filtering standard.

Users have no reasonable expectation of privacy with respect to any messages or information created or maintained on Employer's Technology Resources. Employer may, at its discretion, inspect all files or messages on its Technology Resources at any time for any reason. Employer may also monitor its Technology Resources at any time to determine compliance with its policies, for purposes of legal proceedings, to investigate misconduct, to locate information, or for any other purpose.

Passwords and Security

Certain of Employer's Technology Resources can be accessed only by entering a password. Passwords are intended to prevent unauthorized access to information.

Users are expected to use passwords that comply with the Password Standard and maintain their passwords as confidential. Users must not share passwords and must not access coworkers' systems without express authorization. Passwords do not confer any right of privacy upon any user. Thus, even though users may maintain passwords for accessing Technology Resources, users shall not have any reasonable expectation that any information maintained on Employer's Technology Resources is private.

Storage of Confidential and Highly Confidential data on portable devices must be avoided where possible. Storage of Confidential and Highly Confidential data on portable devices must be approved by an ICS Portfolio Director. When approved, an ICS-managed secure mobile device storage solution must be used. When Technology Resources containing Church information are taken away from the workplace, users must exercise due care to prevent them from being stolen or misplaced. Such devices must never be left unattended in public areas, or stored overnight in vehicles.

Deleted Information

Deleting or erasing information, documents, or messages maintained on Employer's Technology Resources is, in most cases, ineffective. All users should understand that any information kept on Employer's Technology Resources may be electronically recalled or re-created regardless of whether it may have been "deleted" by a user.

Internet Communications

This policy provision covers all publicly accessible Internet communications, including blogs, newsgroups, discussion forums, social networks, e-mail distribution lists and other forms of news media, whether these media forms are used for personal or work purposes as that use relates to, affects, or reflects upon Employer. Authorized representatives of Employer may access and monitor Employer-owned systems and, if needed, disclose records relating to their use. Guests may be given temporary access to the Internet via guest networks and are expected to abide by Church standards for Internet use.

Any information published online must be shared with caution because it becomes widely available to the

public. Users have an obligation to protect confidences, respect others' privacy and otherwise act responsibly as they share information about the work they do and their job.

Prohibited Practices

The following limitations are applicable to all Internet communications regarding Employer:

- Never disclose confidences. The duty of confidentiality extends to current and past work assignments and all information subject to nondisclosure agreements. Consult your supervisor before publishing information when confidentiality may be an issue.
- Do not identify or post pictures of vendors, customers, employees, other interested parties, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.
- Never copy or post copyrighted or trademarked materials or images without the owner's permission. This includes intellectual property of vendors, customers, Employer and The Church of Jesus Christ of Latter-day Saints.
- Do not use Employer's time or systems for fundraising; for partisan political purposes; to endorse, support, oppose, or otherwise comment on the election or candidacy of any candidate for public office; or to advocate for the enactment or defeat of any legislation, unless it is directly and clearly within the scope of your job duties and assignment.
- Do not publish material that is obscene, profane, defamatory, libelous, threatening, hateful, harassing, or abusive to another person or entity.

Required Disclaimer and Comments

You may state that you work for or serve Employer. If you do so, the following disclaimer is required: "The views expressed here are the opinions of [employee's name] and do not necessarily reflect the views of [Employer] or The Church of Jesus Christ of Latter-day Saints." Comments made on blogs can be traced back to the Church. Be cautious about commenting

anonymously on blogs.

Updating Information While on Duty

A supervisor may permit a user to update his or her blog or other Internet forum while at work if the information is relevant to the user's duties. Personal Internet activity should not interfere with the work duties or responsibilities of the user.

Global Technology Support Policy

Church departments, areas, and other administrative organizations should contact the Global Service Center:

- For support of computers, communications systems, and other technologies.
- To report unauthorized access to Church systems.
- To report the loss or probable loss of sensitive information or computing equipment.

To contact the Global Service Center:

- Send an e-mail to cservices@lds.church.org.
- Call **1-801-240-4357** (HELP).
- Call toll free in the United States and Canada at **1-866-678-2763**.
- Call toll free in Europe and Africa at **+800-2950-2950**.

The Global Service Center provides 24-hour service in multiple languages.

Servers and Databases

The ICS Department at Church headquarters has support responsibilities for all servers installed in areas as part of headquarters initiatives, including file servers and servers running headquarters-sponsored legacy applications. This support includes support for the operating system.

When area or department management obtains approval from Church headquarters to use local application systems for specifically identified needs, the application and its associated components will run on servers supported by ICS Department personnel at Church headquarters, regardless of whether the actual servers reside in the area or at Church headquarters. The

servers must be implemented according to the ICS-approved baseline configurations. Deviations from the baseline must be reviewed and approved by the ICS Department. If necessary, an application and its associated components may be run on a system hosted externally by a third party if approved by the director of field management in the ICS Department. The department or area office works directly with the third-party provider to support and maintain the system and its components.

In wards and stakes, the stake technology specialist should coordinate all support and may contact the Global Service Center when additional help is needed.

Unauthorized access to Church systems or the loss of sensitive information should be reported to the Global Service Center, at 1-801-240-4357.

Technology Infrastructure

The Presiding Bishopric and the ICS Department establish and maintain a Church technology infrastructure to ensure that systems operate consistently, reliably, and effectively throughout the world. The Meetinghouse Facilities Department has responsibility for the network cabling and physical network media at Church headquarters.

Outside the United States and Canada, the director for temporal affairs ensures that systems used in the area comply with policies and guidelines and fit into the approved infrastructure. The ICS Department has this responsibility in the U.S. and Canada. The Presiding Bishopric schedules regular ICS operational reviews to help directors for temporal affairs with this responsibility. Areas may request additional reviews to help with a specific need or problem.

Networks

The ICS Department is responsible for the design, implementation, operation, monitoring, and regulation of the Church network—including Internet and wireless access—between and within Church administrative offices. When necessary, this work is coordinated with the Meetinghouse Facilities Department to ensure that the physical network infrastructure is properly designed, installed, and maintained. Internet connections to meetinghouses and small Church offices that are not connected to the Church's internal network

are coordinated with the ICS Department and must use the approved firewall device provided by ICS. When area management installs local area networks and wireless access in these small offices, the area is responsible for costs and support, including configuration, change, license, and security management. All wireless access to these networks must conform to the wireless networking standard for type 2-3 facilities. For meetinghouses, the stake president follows applicable policies and guidelines in determining when to install wireless and other local area networks (see “Internet Connections in Meetinghouses,” below).

Backup and Storage of Electronic Information

In area offices, the director for temporal affairs is responsible for protecting Church information from loss or inappropriate disclosure (managing directors of Church departments have this responsibility at Church headquarters). Area ICS managers assist by periodically verifying with headquarters and the responsible area personnel that all important ecclesiastical and operational information is being properly backed up, is securely stored, and can be restored when needed. A list should be kept identifying all Church data that has been backed up and indicating where and how it is stored.

Areas and departments can contact the ICS Department’s director of field management to request operational reviews to help make sure backup and storage practices are working and information is retrievable.

Information Technology Disaster Recovery Policy

IT Disaster Recovery

Disaster recovery is the ability to sustain or restore mission-critical information technology services in a timely manner following a major incident, such as a fire, storm, or earthquake. The growing dependence of Church organizations on information technology necessitates disaster recovery preparation.

ICS typically provides basic data and system backup and restore services for all solutions. These services support a basic disaster recovery resource, but alone do

not constitute a disaster recovery capability—in the event of a major disruption or disaster they are insufficient for most systems. Additional disaster recovery capabilities required beyond basic backup and restore services are available from ICS, but require deliberate portfolio prioritization and additional funding by the ICS portfolio working group.

Roles and Responsibilities

Presiding Bishopric

The Presiding Bishopric is responsible for oversight and governance of Church business continuity, including disaster recovery.

Church Departments

Each Church department and area is responsible for ensuring they are adequately prepared to manage and recover from a disaster or significantly disruptive event. To do this they rely on enabling Bishopric departments, such as Finance and Records (Risk Management Division), Headquarters Facilities, and Information and Communication Services.

Department heads, working with their controller, ensure that an organization-wide business continuity plan exists, contains the necessary IT recovery requirements to support IT disaster recovery, and is periodically tested.

Finance & Records Department

The Finance and Records Department is responsible for Church business continuity coordination and support. The Risk Management division of FRD provides business continuity services to help Church departments conduct business impact analyses and draft business continuity plans. IT disaster recovery is an important component of a business continuity plan.

Church controllers within each Church department are responsible to ensure their department has a reasonable business continuity plan, including an IT disaster recovery plan. Church controllers should see that business continuity plans and disaster recovery exercises are jointly tested with ICS on a periodic basis to verify they perform as desired.

Information and Communication Services Department

ICS portfolio directors work closely with their working groups and department leadership to identify mission-critical work that is dependent on IT, based on each department's business continuity objectives. The business continuity plan ensures alignment between essential business needs and IT dependencies, so that recovery of needed IT services is reasonably effective in the event of a disaster.

ICS portfolio directors engage with the ICS infrastructure, platform and security and risk divisions to plan, execute and maintain the appropriate level of disaster recovery capability as approved by their respective working group. Department heads and their associated ICS portfolio directors work with ICS leadership to prioritize and fund necessary IT recovery capabilities. ICS portfolio directors deliver solutions that are sufficiently resilient and that meet architectural and other ICS guidelines to enable any needed disaster recovery.

ICS infrastructure and platform divisions ensure the underlying IT disaster recovery services are readily available, practical, and of reasonable cost and effectiveness. The ICS security and risk division provides DR risk services and resources to help support and guide portfolios and departments to identify, manage and report on disaster recovery interests and requirements. The ICS security and risk division also provide the ICS CIO and Presiding Bishopric a regular report on IT disaster recovery risk status across the Church.

ICS infrastructure and platform divisions also ensure key information technology infrastructures and platforms (e.g. DNS, database) are sufficiently resilient to support mission-critical applications in the event of a disaster event. This includes failover and other necessary disaster recovery capabilities. ICS is responsible for prioritizing and funding these requirements.

Business Continuity and Disaster-Recovery Planning

In area offices, the director for temporal affairs has overall responsibility for business continuity planning and for preparing and testing an area disaster recovery plan. Managing directors have this responsibility at Church headquarters. Directors for temporal affairs and

managing directors periodically direct a business impact assessment to identify areas of greatest need. They work closely with ICS managers and other staff members, along with representatives from Church headquarters, to make judgments about priorities and to guide reasonable technology investments for business continuity and disaster recovery. Area ICS managers help coordinate aspects of disaster-recovery planning such as the need for basic emergency power and communication capabilities, as well as requirements for infrastructure and critical application systems that the area expects headquarters departments to address. Area ICS managers discuss the plan with the headquarters field representative so there is a common understanding of roles and expectations.

Electronic Message Management & Use Policy

This policy establishes principles for appropriate electronic messaging use in order to maintain Church standards, provide accountability for users, and meet legal responsibilities. This policy is designed to protect individuals and to reduce risks to Church resources.

Church E-mail System

The ICS Department at Church headquarters provides a Church e-mail system for workforce, General Authorities, general officers, and Area Seventies. Access to the Church E-mail System is given when an employee is hired and is removed when their employment ends.

MyLDSMail System

The ICS Department at headquarters provides the MyLDSMail system for full-time missionaries. The Area Presidency or Presidency of the Seventy, working with the mission president, determines how missionaries in the area can use MyLDSMail. Newly called missionaries are eligible for an e-mail account when they begin service. This account is maintained for several months after a missionary is released, until the missionary's records are archived, at which time the email account is purged.

LDSMail System

The ICS Department provides another e-mail service, LDSMail, for certain Church organizations, such as

stakes, family history centers, seminaries, and institutes. These are organizational and not individual e-mail accounts.

Information contained in Church e-mail address books is confidential and should not be shared without approval of the ICS Department. Approval may be requested by contacting the Office of the CISO.

Authorized for Church business and operations

The Church provides electronic messaging systems to facilitate Church business and operations. The Church owns the contents of all Church messaging systems. Only Church-provided e-mail, instant messaging and voicemail systems may be used to conduct internal Church business and operations. Use of Church messaging systems is limited to internal users and authorized contracted third parties (collectively referred to as “users”).

Use of personal messaging systems not authorized

Do not use personal e-mail and other messaging systems, or messaging services hosted by other organizations, for internal Church business and do not forward internal messages to these services.

Sending or forwarding inappropriate content is prohibited

Sending or forwarding electronic messages that either contain or refer to material that is sexually oriented, offensive, fraudulent, harassing, intimidating, defamatory, threatening, abusive, or improperly discriminatory is prohibited. Such material is not only inappropriate, but may also be illegal, and sending such messages may result in disciplinary action against the user(s) involved.

Privacy

The Church reserves the right to access and, when appropriate, disclose all messages created, sent, or received electronically. Church messaging systems should be used with the expectation that messages and use may be reviewed by any authorized representative of the Church. The Church uses an approved process to ensure such review is warranted and handled appropriately. Personal communications using Church

systems will be treated no differently than other Church messages.

Personal use

Incidental and occasional personal use of Church messaging systems is permitted. Personal use of Church messaging systems for commercial or political purposes is prohibited, as is any use that is illegal or would bring unfavorable attention to the Church such as broadcasting personal views on social issues.

Access security

Authorized users are responsible to maintain the security of electronic messages and accounts. Access must be secured by an appropriate password or PIN that meets minimum security standards. (For password standards see the Password Standard, and for PIN requirements see the Mobile Device Security Standard.)

Message retention and storage

Business-critical messages

Electronic messages and/or attachments that have historical, administrative, regulatory, compliance, or legal importance must be retained (1) in the method and location approved for that purpose and (2) for the period required by the Church’s information retention schedule. Business-critical messages include, but are not limited to:

- messages that initiate, authorize, evidence, or complete a business transaction
- messages required to be retained by government regulations
- messages that promulgate Church policies and directives
- messages documenting employee performance or corrective action

Active messages

A user may save other messages needed for future reference or pertaining to ongoing matters by moving them to another folder in the mailbox. Each user’s mailbox is subject to a size limit.

Automatic message deletion

For operational reasons, e-mail messages, voice mail and instant messages are considered transitory and the mailbox size is limited. All electronic messages in the user's Inbox and Sent Items folders will be moved to the Deleted Items folder after 90 days and deleted from the system after 120 days, unless otherwise acted upon by the user.

Messages related to legal proceedings

Messages pertaining to actual or threatened legal proceedings or government investigations will be retained, as directed by the Office of General Counsel, until the proceeding or investigation is concluded.

Message Retention and Storage Exceptions

Department or area management and internal users share responsibility for appropriate retention and disposition of message content. When, for a particular business function, compelling reasons require, a department or area may provide needed exceptions to these provisions of this policy. Exceptions shall be written, approved by the managing director or Director for Temporal Affairs after consulting with the Office of General Counsel and Church Information Security Officer, and narrowly tailored to address the compelling need.

System Backups

Data backups of messaging systems are for disaster recovery purposes only and are not archival.

Other Communication Systems Use Policy

Church Satellite System

The Church Satellite System, provided by the ICS Department at Church headquarters, is used for general, regional, and special broadcasts.

General Authorities may request satellite broadcasts for meetings and other events. They should contact the Publication Services Department at Church headquarters to arrange a broadcast. Use of satellites may be limited, due to conflicts with other broadcasts. If a satellite is used, the Publication Services Department will provide funding and event support and will work

with the ICS Department for technical support.

General, area, stake, and other Church leaders are sent a schedule of all broadcasts planned for the upcoming year. This schedule is also available online. In addition, the Church sends information to stake presidents about each upcoming broadcast, including dates, times, and other details. This information is typically also found on the LDS.org calendar.

Satellite Systems in the United States and Canada

In the United States and Canada, the Presidency of the Seventy may approve Church satellite downlink sites in accordance with the following requirements:

1. Each stake or district is allowed one satellite downlink site, providing Church satellite coverage is available in that area. If multiple satellite downlinks already exist within a stake or district, they can continue, subject to the principles in this policy.
2. Internet streaming should be used for all other meetinghouses within the stake or district. Additional new satellite downlink sites are approved for a stake or district only when both of the following conditions are met:
 - a. Available Internet bandwidth is insufficient to support Internet streaming.
 - b. Excessive travel is required, or the expected attendance exceeds seating capacity at the existing downlink site.
3. Each request for a satellite downlink site must be validated by the Church's ICS satellite engineering team to ensure that the installation will conform to established technical guidelines.
4. All exceptions must be authorized by the Budget and Appropriations Committee.

When sufficient Internet bandwidth is available, Internet streaming is preferable to satellite transmission. Over time, it should replace the use of multiple satellite downlink systems within close geographic proximity to each other. Internet streaming allows more meetinghouses to participate in broadcasts without expensive satellite downlinks at each location.

Satellite Systems outside the United States and

Canada

In areas outside the United States and Canada, Area Presidencies may approve Church satellite downlink site deployments in accordance with the following requirements:

1. Each stake or district is allowed to have at least one satellite downlink site, providing Church satellite coverage is available in that area.
2. Additional downlink sites may be approved where excessive travel is required or expected attendance exceeds the capacity of the existing downlink sites.
3. Each request must be validated by the Church's ICS satellite engineering team to ensure the installation will conform to established technical guidelines.
4. All other exceptions must be authorized by the Budget and Appropriations Committee.

Satellite System Maintenance

The maintenance of satellite, audio, and video systems is primarily the responsibility of the local facilities management (FM) group. In most circumstances, the associated sound and video systems are permanently installed and tied into the satellite system and contain few if any user-serviceable parts.

Problems with satellite reception are usually caused by failure of equipment at the satellite site, such as the satellite receiver or dish. Regional issues may be caused by power outages, solar interference, and weather-related interference. Global outages are rare. The stake technology specialist should test satellite systems well before a broadcast and contact the FM group for support. If assistance is needed during a broadcast, stake leaders may contact ICS Department Satellite Support at 1-801-240-3454, but wait times during broadcasts tend to be long.

The ICS Department maintains services from global satellite carriers for worldwide coverage and designates specific carriers for use in specific locations (see the list of approved carriers for details). While most broadcasts are available worldwide at the same time, some (such as rebroadcasts, temple dedications, and regional broadcasts) are available only at a specific time and region. When a large number of broadcasts occur at the

same time, extra carriers may be arranged as needed; stakes will be advised of special operating details when this occurs.

Satellite System Use Policy

Satellite systems at meetinghouses may not be used to view or record television, cable, or satellite programs that are not sponsored by the Church. Members may not change any settings of the satellite antenna or receiver without authorization from the ICS Department.

The stake technology specialist is the primary operator of satellite equipment at a meetinghouse. The Church sends *stake satellite operator instructions* to each stake, which should be posted on the cabinet containing the satellite receiver. Only those who are trained to operate this equipment may do so. Youth may help operate it only if they are supervised. All equipment should be locked securely when not in use.

Satellite receiver sites are also authorized for Church administrative offices and institutes of religion. Requests for satellite systems at institutes must be approved by the Seminaries and Institutes Department at Church headquarters (e-mail: SI-Facilities@ldschurch.org, phone: 1-801-240-1136).

Data uplink and other satellite technologies are used in the Church to meet special needs. These are approved and implemented by the ICS Department.

Video Conferencing and Webcasting Technology

Use of Internet streaming, video conferencing, and webcasting is encouraged to improve communication and to reduce travel burdens. This technology is often used for broadcasts, meetings, training, and interviews. It may be used only for noncommercial, Church-related purposes.

Corporate Video Conferencing

Corporate video conferencing makes possible audio and video communication among multiple users at multiple sites. Corporate video conferencing requires the use of established equipment in rooms that are specifically designated for video conferencing. All video conferencing technology in the Church is selected and approved by the ICS Department at Church

headquarters.

In the United States and Canada, the ICS Department installs, supports, and maintains video conferencing equipment. New and replacement equipment is funded through physical facilities budgets for buildings they manage. Otherwise, departments that will use the equipment pay for those purchases. New video conference equipment purchased as part of a conference room upgrade, or IT related work and equipment for new buildings and building moves, should be budgeted in the facilities project budget, as described in annual budget procedures.

The annual budget procedures document defines how video conferencing equipment and associated maintenance expenses are to be budgeted.

Outside the United States and Canada, the area office installs, supports, and maintains video conferencing equipment approved by the ICS Department. New and replacement equipment is funded through area budgets.

A local video conferencing specialist should be assigned to coordinate use and maintenance of video conferencing equipment. Where feasible, the equipment should be kept in a secure location or locked cabinet. The power should be left on, even when the equipment is not in use, to allow remote support.

For more information, see the *Service Catalog*, which is available from the Church intranet.

Personal Video Conferencing

Like corporate video conferencing, personal video conferencing (PVC) is used to communicate (with video and audio) between different sites using the Internet. However, PVC requires only a personal computer or mobile device with an Internet connection and requires each participant to first register and then log in with the LDS Account. PVC is well suited for conversations and interviews and is available for all Church organizations and select ecclesiastical leadership positions. It should be used for Church business only. For more information on PVC, visit pvc.lds.org or the *Service Catalog*.

Webcasting

Webcasting sends a one-way audio and video Internet broadcast to remote locations. Webcasting

technology is available for Church units worldwide. It may be used to broadcast regional and stake conferences; regional and stake firesides; area, region, and stake training; and other meetings and events. It can eliminate the need for multiple stake conference sessions, minimize costly satellite downlinks, reduce travel costs, and help more people participate in events. The stake president determines when webcasting is appropriate in the stake.

Webcasting equipment is approved by the ICS Department at Church headquarters and is available for purchase by stakes at store.lds.org.

More information on webcasting is available on the LDS Tech website.

Broadcasts on LDS.org

Most general Church broadcasts can be viewed live or on-demand on LDS.org. This requires a computer connected to the Internet.

Some broadcasts are also available for members to download and save to a USB drive or DVD. Members can also view downloaded broadcasts by connecting their computer to a projector or TV.

For more information, see the “Broadcasts” section on the Meetinghouse Technology website.

Telephone Systems

Telephones are authorized at all Church facilities, if the phones are locally available and reasonably priced.

Telephone systems for departments and areas must be approved by the ICS Department at Church headquarters and meet Church network standards. Whenever an existing telephone system is replaced, the department or area coordinates with the ICS Department to select the right system, technology, and vendor. Additional information is available in the *Service Catalog*.

Audiovisual Equipment in Meetinghouses

The stake president, with assistance from the stake technology specialist, oversees the use of audiovisual equipment, such as projection devices and screens, in meetinghouses. Such equipment is included in the furnishings and equipment list in the approved

meetinghouse standard plan and is managed by the director for temporal Affairs (outside the U.S. and Canada) or the Meetinghouse Facilities Department (in the U.S. and Canada). More information on meetinghouse audio-visual technology is available on the Meetinghouse Technology site.

Church Websites Policy

Church Websites

All Church websites are established and coordinated by the Presiding Bishopric through the ICS Department, as overseen by the Church Services Committee (CSC). Any other website claiming to represent the Church is not permitted. Public-facing websites may be used by Church administrative, ecclesiastical, and other organizations when authorized by policy.

“The Church provides a number of official Web sites and other Internet resources for general use. These sites and resources are clearly identified as official either by use of the Church logo or in some other way [such as a statement indicating that the site is an official website of The Church of Jesus Christ of Latter-day Saints]. They also comply with legal requirements and the Church’s intellectual property and privacy policies” (*Handbook 2*, 21.1.22).

On official Church country websites, area leaders can provide official Church materials and approved information of local interest that has been adapted to the needs of a country or geographic region.

“Stake and ward Web sites may be created only by using the official Church Internet resources. Stakes and wards are not authorized to create other Web sites or blogs or otherwise have a Church-sponsored presence on the Internet. . . . On occasion, official Church Web sites may be approved for other purposes, such as multi-stake projects, special events, and young single adult activities and organization. To seek approval for such a site, the organization’s priesthood leader submits a request stating the purpose and need to a member of the Presidency of the Seventy or the Area Presidency” (*Handbook 2*, 21.1.22).

Members Fulfilling Church Callings

When members, as part of their Church callings, create websites or blogs or make use of other Internet tools, they should follow these requirements:

1. They should state that their site is not an official Church website and include the name and contact information of the member who is responsible for it.
2. They may refer to their calling and the name of the Church, along with the name of the local unit and organization in which they serve. However, it should not be stated or implied that the site or the information is sponsored or endorsed by the Church. They may not include any references to unit numbers on the site.
3. They may put links to official Church websites on their personal websites, including links that contain graphics with Church logos, but they may not imitate or use the Church logo in other ways.
4. They should obtain proper permission before using artwork, music, or other materials if permission is not indicated on the site from which it comes (see *Handbook 2*, 21.1.12).
5. They should not include personal or private information about others—including photographs, birth dates, and ward directory information such as names, addresses, and contact information—without their permission.

Personal Use of Internet by

Welfare Services

Executive Summary

Encouraging Self-Reliance and Preparedness

A member of the Presidency of the Seventy or the Area Presidency encourages Church members and families to become self-reliant. The primary responsibility for becoming self-reliant and preparing for adversity rests with individual members and families. When members need more than what they or their families are able to provide, their bishop stands ready to help.

Fast-Offering Assistance

Bishops are responsible to gather fast-offering donations and to see that fast-offering assistance is given as outlined in the *Church Handbook of Instructions, Book 1*, 16–21.

Welfare Operations

Welfare operations, such as bishops' storehouses, employment resource centers, LDS Family Services, and so on, may be established as resources for the bishop when approved. Welfare operations or projects (whether operated by paid employees, Church-service missionaries, or volunteers) are opened, changed in scope, or closed only with the approval of the Welfare Services managing director, Welfare Executive Committee and/or General Welfare Committee, and the concurrence of the Area Presidency.

Humanitarian Services

Humanitarian projects assist primarily those who are not members of the Church, although they are normally organized in locations where local members may serve and benefit as well.

Emergency Response

Church emergency response funds can be used to give short-term assistance to victims of natural disasters, famine, war, civil unrest, and economic failure. Church leaders should follow the same principles of self-reliance when administering these funds as they do when providing fast-offering assistance.

Introduction

The Prophet Joseph Smith said, “[We are] to feed the hungry, to clothe the naked, to provide for the widow, to dry up the tear of the orphan, to comfort the afflicted, whether in this church, or in any other, or in no church at all, wherever [we find] them” (*Times and Seasons*, Mar. 15, 1842, 732).

“The objectives of Church welfare assistance are to (1) help members become self-reliant and stand independent of all welfare assistance, regardless of its source; (2) help members become stronger spiritually and learn to provide for others; and (3) build integrity, self-respect, dignity, and soundness of character in each person who receives help” (*Church Handbook of Instructions, Book 1*, 17).

These objectives are met through bishops administering fast-offering assistance and welfare operations, such as Bishops' Storehouse Services (bishops' storehouses, clothing distribution centers, home storage centers, canneries and processing facilities, farms and ranches, and grain storage), Deseret Industries, employment resource centers, LDS Family Services, humanitarian projects, and emergency response efforts. Welfare Services also provides support to the Perpetual Education Fund and its participants.

Presiding Bishopric

The Presiding Bishopric oversees Church welfare operations (see D&C 42:31–34), approves the processes for Welfare Services throughout the Church, and determines who will manage and operate these processes. They recommend new welfare operations to the General Welfare Committee. They also plan the quantity and quality of goods to be produced, distributed, and stored and the services to be rendered.

Managing Director

The managing director of Welfare Services reports to the Presiding Bishopric and assists them with their welfare responsibilities. As directed by the Presiding Bishopric, he is responsible for the global management

of the welfare process and its corresponding procedures, the processing of requests for exceptions to this process and these procedures, and welfare training and evaluation.

A Member of the Presidency of the Seventy or the Area Presidency

A member of the Presidency of the Seventy or the Area Presidency is responsible for spiritual and temporal welfare in the area. This includes:

- Teaching Church leaders and members the principles of spiritual and temporal welfare and helping them understand their duties.
- Setting and implementing welfare priorities and teaching welfare policies.
- Overseeing welfare operations in the area.
- Chairing the area welfare committee and overseeing coordinating councils.
- Approving responses to emergencies.
- Overseeing the development and implementation of humanitarian plans in areas outside the United States and Canada.
- Requesting new welfare operations when needed.

Director for Temporal Affairs

The director for temporal affairs assists a member of the Presidency of the Seventy or the Area Presidency and local leaders in their welfare responsibilities. To do this, he:

- Meets with a member of the Presidency of the Seventy or the Area Presidency regularly to discuss welfare matters.
- Instructs local leaders as directed by a member of the Presidency of the Seventy or the Area Presidency.
- Requests the establishment of welfare operations when needed.
- Monitors the use of fast offerings.
- Develops and implements the annual area welfare and humanitarian plans.

- Serves on the area welfare committee and prepares the agenda for its meetings.
- Implements emergency response efforts.
- As assigned by the Presiding Bishopric, ensures that welfare operations follow the processes approved by the Presiding Bishopric.
- Provides services to Perpetual Education Fund participants.

Area Welfare Committee

The Area Presidency organizes an area welfare committee. An assigned member of the Area Presidency is the chairman of this committee.

Other members include the director for temporal affairs, the area controller, the area welfare manager, and area welfare specialists. Others may attend committee meetings as invited.

The area welfare committee meets regularly and has the following duties:

- Develop, implement, and monitor welfare priorities
- Oversee fast-offering administration
- Prepare and oversee the implementation of the humanitarian plan and emergency response efforts
- Make welfare assignments
- Make recommendations to the Area President for new welfare operations

Area Councils

Area council meetings should include discussions on welfare principles, operations, needs, and concerns (see *Church Handbook of Instructions, Book 1, 59*).

Coordinating Councils

A member of the Presidency of the Seventy or the Area Presidency organizes coordinating councils that consist of an assigned Area Seventy, who presides, and the stake presidents in the council's assigned geographic area. In coordinating council meetings, leaders consider welfare matters, which may include teaching welfare principles and duties, implementing instructions from

presiding authorities, planning responses to emergencies, receiving reports from agent stake operating committee chairmen concerning their welfare operations, and encouraging fast-offering donations.

Agent Stake Operating Committee

A member of the Presidency of the Seventy or the Area Presidency assigns an agent stake to each Church welfare operation.

The president of the agent stake organizes and chairs an agent stake operating committee. Other members of the committee include the chairman of the stake bishops' welfare council, the stake Relief Society president, the manager of the operation, and other specialists as needed.

The committee meets regularly to provide priesthood guidance and support to the assigned welfare operation by:

- Ensuring that operational plans are in place.
- Arranging for Church-service missionaries and volunteers.
- Helping coordinate the maintenance of the operation's facilities.
- Providing feedback from local leaders and members to the operation manager.
- Planning ways to help Church leaders use the welfare operation effectively.

The agent stake operating committee may be asked to host regular "new-leader welfare training" to instruct recently called leaders about the welfare operation and its services.

The president of the agent stake represents the operation in coordinating council meetings.

The agent stake president may communicate with and, as needed, meet with the stake presidents of all of the stakes served by the welfare operation to coordinate volunteer labor assignments and address any concerns about the quality of service.

Encouraging Self-Reliance and

Preparedness

A member of the Presidency of the Seventy or the Area Presidency encourages Church members and families to become self-reliant. The primary responsibility for becoming self-reliant and preparing for adversity rests with individual members and families.

When members need more than what they or their families are able to provide, their bishop stands ready to help. Melchizedek Priesthood quorums and the Relief Society play a central role in assisting the bishop as he helps individuals and families meet short-term and long-term welfare needs in ways that lead to self-reliance.

Church leaders encourage Church members to prepare for emergencies, but they should not conduct mock emergency exercises among Church units and members.

Fast-Offering Assistance

Bishops are responsible to gather fast-offering donations and to see that fast-offering assistance is given as outlined in the *Church Handbook of Instructions, Book 1*, 16–21.

The director for temporal affairs and the area welfare committee monitor the donation and use of fast offerings. They identify trends in fast-offering expenditures, noting instances where fast-offering assistance may not have followed welfare principles. They also oversee the development of training plans to help Church leaders learn how to use fast offerings and increase fast-offering donations.

Temporary Procedures for Fast-Offering Assistance

Priesthood leaders should administer fast offerings as outlined in *Handbook 1: Stake Presidents and Bishops* (5.2.4) and discuss these handbook principles in area councils, coordinating councils, and stake and ward councils. Procedures that limit a bishop's ability to provide fast-offering assistance other than those outlined in *Handbook 1* may not be implemented in areas without the approval of the General Welfare Committee.

In cases where a temporary exception for a specific problem is deemed necessary, Area presidencies should request authorization to do so. Such requests may be submitted to the Presiding Bishopric for consideration by the General Welfare committee.

Fast-Offering Assistance from the Area Administration Office for Church Members

Church members who come to the administration office seeking fast-offering assistance may be helped in accordance with established procedures.

Assisting Transient and Homeless People

A bishop may assist transient and homeless people, whether or not they are members of the Church, but he should be discerning about the type and amount of assistance he gives. Individuals who are not members of the Church are usually referred to local community resources if they need welfare assistance. Where there are two or more wards in the vicinity, the stake president may appoint one bishop to handle all requests from transients. Any assistance rendered is charged to that bishop's ward (see *Church Handbook of Instructions, Book 1*, 20–21).

Where large numbers of transient and homeless people are seeking assistance, a member of the Presidency of the Seventy or the Area Presidency may send a request to the Presiding Bishopric to establish a transient and homeless services office according to established or temporary procedures. Assistance is provided from the office's fast-offering account (see *Church Handbook of Instructions, Book 1*, 10, 20–21).

Bishops' Storehouse Services

Bishops' Storehouse Services produce, process, and store food, distribute it to those in need, and provide work and service opportunities for members.

Bishops' Storehouse Services include the following operations: bishops' storehouses, clothing distribution centers, home storage centers, canneries and processing facilities, farms and ranches, and grain storage facilities.

Bishops' storehouses, home storage centers, and clothing distribution centers are operated by Church-service missionaries and volunteers, under the direction of agent stake operating committees. Bishops' central

storehouses, canneries, processing facilities, farms, and granaries are typically managed by paid Church staff with technical training.

Bishops' Storehouses

A completed Bishop's Order for Commodities form is required before a bishops' storehouse can distribute commodities. An order should meet the needs of the welfare recipient for about two weeks.

If a storehouse is not available, or if a person has special dietary needs not provided for in the storehouse, bishops may use fast-offering funds to buy needed commodities from local merchants.

Contracts with Grocery Stores

In locations that do not meet the criteria to establish a bishops' storehouse, the director for temporal affairs oversees the negotiation of contracts with reputable grocery stores that bishops can use to provide commodity assistance to members. The ward pays for these commodities from fast-offering funds. In addition to meeting basic food needs, contracted stores may also be used to provide short-term emergency relief in the event of a disaster.

Clothing Distribution Centers

Where there is a bishops' storehouse, the Area Presidency may send a request to the Presiding Bishopric to establish a clothing distribution center, where clothing can be donated for those in need. The clothing is distributed to the poor and needy as requested by bishops on the Bishop's Order for Commodities form.

Home Storage Centers

If there is a bishops' storehouse in the area, a member of the Presidency of the Seventy or the Area Presidency may send a request to the Presiding Bishopric to establish a home storage center.

Canneries and Processing Facilities

Canneries and other processing facilities prepare commodities for bishops' storehouses. In some locations, members may use these facilities to process, package, and purchase basic foods—such as meats, vegetables, and fruits—for home use.

Stakes and wards may be assigned to support production in these facilities. Those working at the facilities should cooperate fully with supervisory personnel and follow established procedures to ensure product safety, quality, and shelf life.

Farms and Ranches

Farms (including orchards and vineyards) and ranches provide fresh produce, meat, and dairy products for storehouse distribution and for canneries and other processing facilities. In some locations, farms also provide grains for long-term storage.

Grain Storage

Storage facilities for wheat and beans are strategically located. They are used to support bishops' storehouses and home storage centers and to meet other Church needs.

Deseret Industries

Deseret Industries operates thrift stores and manufacturing facilities that provide temporary work and training and teach proper work behavior. Church leaders can use Deseret Industries to help members overcome employment barriers and become self-reliant through work, training, service, and job placement. Bishops refer members to a Deseret Industries development specialist and also call a welfare specialist to serve as a mentor. Working with the mentor, the development specialist helps the member develop a self-reliance plan and access training and other resources that can help them get and keep a better job.

Where a Deseret Industries facility does not exist, a development specialist works out of an employment resource center, assisting those with barriers to employment by accessing other Church and community resources.

Perpetual Education Fund

The Area Presidency is responsible for the Perpetual Education Fund (PEF) program in the area. They are assisted by the area PEF committee, the director for temporal affairs, and, where approved, an area PEF coordinator, who is a Church employee.

Area Perpetual Education Fund Committee

The Area Presidency organizes the area PEF committee. The Area President assigns a member of the Area Presidency to chair the committee. Other committee members include the area Church Educational System director (who generally serves as the vice chairman of the committee), the director for temporal affairs, the area controller, the area welfare manager, and the PEF coordinator (who serves as the committee secretary). Others may also attend PEF committee meetings as invited by the committee chairman. The area PEF committee is responsible to:

- Develop, implement, and monitor the PEF program in the area and ensure its success.
- Work to improve participants' graduation rates, employment rates, job quality, and repayment rates.
- Ensure that PEF participants are trained and supported.
- Coordinate the efforts of Church leaders and train them in their responsibilities for PEF participants.

Employment Resource Centers

Employment resource centers support Church leaders in their efforts to help members achieve self-reliance. Here members can receive help finding jobs or improving their employment, obtaining education and training, and starting or improving their own small business. A member of the Presidency of the Seventy or the Area Presidency and the president of the agent stake for the employment resource center define the priorities and goals for the center. As assigned by the Presiding Bishopric, the director for temporal affairs oversees the operation of employment resource centers and supervises any paid employees.

There are two types of employment resource centers: professional centers, which are managed and staffed by Church employees and Church-service missionaries, and volunteer centers, which are managed and staffed by Church-service missionaries whose calling is coordinated by the agent stake president. Church-service missionaries receive their training from the agent stake, with help from the director for temporal affairs, who may assign area welfare personnel and personnel from professional and other volunteer employment centers to assist.

The area initiates and administers funding for both types of employment resource centers.

Stake Employment Centers

Stakes may organize employment centers that they operate themselves and fund from their budget allowance. Such centers are housed in Church-owned facilities. They are managed by a stake employment specialist called by the stake presidency. Stakes may request training for their employment resource centers from the director for temporal affairs, who assigns area welfare personnel and personnel from professional and volunteer employment centers to help provide the needed training.

Church Employment Resource Services to Those of Other Faiths

Church employment resource centers should focus on assisting Church members with their employment and self-employment needs. Employment resource centers may provide services to those who are not members of the Church, but leaders should not actively promote these services to them.

Employment Resource Center Services to Perpetual Education Fund Participants

Employment resource centers help the area PEF committee assist those who are eligible or may become eligible to receive PEF loans. Employment resource centers:

- Teach applicants job-searching skills.
- Review PEF loan applications.
- Help participants identify appropriate schools.
- Help PEF participants find part-time work while attending school.
- Help PEF participants find employment after graduation.

LDS Family Services

The General Welfare Committee has authorized the establishment and operation of LDS Family Services in the United States and Canada that offer the following services:

Consultation with Church leaders, including:

- Training on key social and emotional topics.
- Identifying and referring to qualified community resources.
- Using the abuse help line. (In the United States and Canada, the number is 1-801-240-1911 or 1-800-453-3860, extension 2-1911. In countries without an abuse help line, the stake president or bishop should contact the Area Presidency for help dealing with abuse.)

Developing community resources and referring members to these resources.

Counseling.

Adoption services, including assistance to unwed parents.

Outside the United States and Canada, LDS Family Services provides selected services based on needs and approved programs in the area.

Areas Where LDS Family Services Is Inaccessible

In areas where LDS Family Services is not easily accessible, the Area Presidency may contact LDS Family Services at Church headquarters to determine what materials and programs are available to help members.

Humanitarian Services

The objectives of Humanitarian Services are to:

- Relieve suffering by responding to emergencies.
- Help families and individuals become self-reliant.
- Help local and national governments or agencies develop programs to promote self-reliance.
- Promote goodwill and a better understanding of the mission and purposes of the Church.
- Provide members the opportunity to serve.

Area Annual Humanitarian Plan

Major initiatives, such as clean water, wheelchairs, neonatal resuscitation training, vision, and food, are managed by the area in cooperation with Welfare

Services.

Area initiatives generally involve less than U.S. \$25,000 each and are administered by the area.

Emergency Response

Church emergency response funds can be used to give short-term assistance to victims of natural disasters. Church leaders should follow the same principles of self-reliance when administering these funds as they do when providing fast-offering assistance.

When the emergency response to a disaster requires humanitarian funding beyond the authorized \$25,000 that an Area Presidency can spend, headquarters reserves the right to send at least one staff member to the affected area to help with the assessment and planning of an appropriate response to the emergency.

Funding for Emergencies

With help from the area welfare committee, the Area Presidency determines the type and amount of aid to provide and the roles coordinating councils and stake presidents should fulfill in rendering emergency aid.

Authorization levels for emergency response expenditures are as follows:

International Area Presidency \$25,000

Welfare Finance Committee \$100,000

Presiding Bishopric \$1,000,000

Budget and Appropriations Committee over \$1,000,000

Area Seventy

Under the direction of the Presiding Bishopric and either the Area Presidency or a member of the Presidency of the Seventy, the Area Seventy may be assigned to oversee Church emergency response efforts in a defined location. The Area Seventy works closely with local stake presidents and other leaders to coordinate Church relief activities.

Communication Services

Digital Media Guidelines

Executive Summary

Updated: January 2014

These guidelines are to be used to request approval for Church websites or social media resources. Social media resources include Facebook, YouTube, Twitter, blogs, etc.

Note: this guideline is limited to external or publicly accessible websites and social media resources.

Preface

Each year the Church produces hundreds of products and messages. Without oversight, these messages and their distribution can easily become overwhelming and duplicative. To oversee Church digital messaging and distribution, the First Presidency formed the Communication Services Committee (CSC) and commissioned the members of that committee to help Church departments and entities convey the Church's message to the world, conserve resources, and stay alert to new opportunities. Thus, the CSC reviews each department's requests for digital media resources to ensure that all Church-produced messages and their distribution support the purposes, priorities, and programs of the Church as defined by the Brethren. Digital media resources include content, domain names, websites, web applications, social media properties, and mobile applications. CSC review must be performed even if the initiative was included in the annual plan (or if a significant change is made to an existing product or digital resource, such as redesigning or changing the purpose of a website).

The CSC's review and approval of Church digital media resources are part of a joint effort with the Correlation Department. The CSC tracks the impact of content, programs, and materials on members' time and money, and the Correlation Department helps ensure compliance with Church intellectual property, visual identity, and privacy laws and regulations. Furthermore, the CSC reviews and approves only public-facing or

member-facing digital media resource requests, while the Correlation Department reviews and approves all requests for Church products, programs, and messages, including department materials for general use in all formats—printed, Internet, video (broadcasts), and digital resources.

Step-by-step instructions for reviewing project requests with the CSC and Correlation can be found here: http://cor-ipd.ldschurch.org/?page_id=2527.

Publishing Guidelines

Those who are publishing content through digital channels should specifically identify the best practices used for determining (1) primary and secondary audiences, (2) appropriate voice and tone for the intended audience, and (3) relevant research methodology when selecting distribution channels for the intended audience. Some best practices include:

- Understand why a particular piece of content should be created and shared.
- Anchor content to the core gospel principles and words of living prophets to most effectively reach those who seek to follow Jesus Christ.
- Focus on creating relevant and personal content that the intended audience will want to and be able to share easily.
- Provide content that is relevant and timely (e.g., a local or current event).
- Use an authentic, active voice that the intended audience can emotionally relate to (imperative or interrogative in the second person) rather than a formal, passive voice (declarative, exclamatory in the third person) when writing.
- Eliminate unnecessary words (e.g., *a number of* vs. *many*, *for the duration of* vs. *during*) and anything that may be cryptic or unclear that the general public would not understand (e.g., technical or internal Church jargon).
- Use short, simple sentences and familiar words that

sound natural when read aloud.

- Use appropriate visual imagery consistent with guidelines.
- Remember search engine optimization (SEO) best practices, especially with regard to tagging images and text.
- Follow escalation guidelines for posts or comments that may be threatening to a particular person or organization (i.e., notify your manager and Church Security of nefarious activity).
- Consider content language and translation needs (for both text and images) as most digital media reaches across cultural and language boundaries.
- Consider how the Brethren would feel if they were to see the published content. (Keep in mind that the Brethren may not be the intended audience.)
- Avoid political campaigning.
- Do not identify or post pictures of employees, vendors, customers, missionaries, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.
- For more information about general employment use of digital resources, see <https://policypoint.ldschurch.org>.
- Recognize that information published on social media properties should first be classified as *public*. Never disclose confidences over digital media. (*Public* is defined as information formally approved for public release that must be protected at its official source against loss or change. Such information includes the scriptures, curriculum materials, news releases, and official information about the Church and its doctrines. For more information about data classifications, see <https://policypoint.ldschurch.org>.)

Social Media Escalation

Comments that make claims or threats to hack, attack or disrupt Church web proprieties, LDS.org, Mormon.org, etc., or social media sites should be reported. Included might be comments, claims, or

threats to obtain Church Information such as membership records, financial records, temple records or information about Church leadership or comments that claim to have access to insider information or sources. If in doubt, please report your concern. There is no harm in over reporting.

Keywords might include:

- Hacking
- Cracking
- Attacking
- Data
- Computers
- Denial of Service (DOS)
- Distributed Denial of Service (DDOS)
- LDS account
- Passwords
- Insider
- Sources
- Whistleblower

Concerning social media comments related to computer and information security should be reported by emailing SECOPS@ldschurch.org. Please include in the email a copy of the related social media comment including screen name, time stamp and social media property. You can also contact security operations by phone (801)-240-1919. Someone is available 24/7.

Administering Social Media Profiles and Accounts

Those who request approval to create and manage social media profiles and accounts should be aware of the administrative support required for maintaining and protecting them. All social media profiles intended for Church use are to be created and registered by the Intellectual Property Division of the Correlation Department (see Social Media Profiles and Accounts Notice at http://cor-ipd.ldschurch.org/?page_id=2632). Those who have direct access to publish content (i.e., those who know the username and password) should be

kept to a minimum (i.e., certainly more than one, but not more than three or four).

Those who publish or moderate content should only access accounts through centralized and approved tools (currently *Adobe Social* for social media accounts, polling, or live-streaming apps). Exceptions to centralized administration of user accounts are reviewed case by case. The Publishing Services Department can assist with account management needs. Some best practices for administering profiles include:

- Grant username and password access through Church-approved solutions (e.g., Adobe Social). The Publishing Services Department can advise on the appropriate administrative tool.
- Follow current Church policies for password strength. For more information, see <https://policypoint.ldschurch.org> or <https://apps.ldschurch.org/sites/itsecurity>.
- Adjust built-in settings to automatically filter profanity and censor other inappropriate content.
- Do not allow users to post to Facebook or Google+ pages. Users may comment on posts published by the Church, but they should not create posts themselves.
- Designate one or more moderators to consistently review social media posts. Review frequency will depend on the individual resource or account but should be no less than twice a week.

Measuring Performance

As a general rule, the success of content published through the web, mobile, or social media resource should be defined at the onset and measured over time. Digital media provides unique advantages to test and tune content so that it effectively resonates with the intended audience. Some common units of measure include:

- Click-through—how frequently people click on the content to learn more.
- Reach—the number of people who read or viewed your content in a given time period.
- Engagement—the number of individuals who interacted with your content in a given period of time

(e.g., likes, retweets, and +1's).

- Audience growth—the change in number of individuals following your account over a given time period.
- Resonance—the degree to which people are responding to your comments by sharing it with others.
- Perception—the sentiment or feeling toward a particular piece of content.